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STISETSWeb MO

User Manual

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This document was last modified on October 30, 2008. Any subsequent changes made to the STI applications described herein will be discussed in the release notes that accompany each product's update.

Contents

Introduction

About STISETSWeb

STISETSWeb is a browser-based Special Education data tracking system that provides the Special Education professional with a comprehensive system for achieving and maintaining compliance with the state-mandated Special Education procedure for students. All state-approved forms are contained in this software. Since this software is fully integrated with the data from the local school STIOffice program, Special Education personnel may view the following information:

- Student and Guardian demographics
- Entries/Withdrawals
- Attendance
- Discipline
- Schedules
- Grades

STISETSWeb features pre-loaded reports that will track due dates for IEPs, as well as Re-Evaluation reports to determine continued eligibility. Reporting includes both school- and district-wide listings. State Child Count reporting features are also included.

How STISETSWeb Works

Since STISETSWeb is a Web-based application, users at both the school and district levels will access the program via an Internet connection. STIDistrict Sets and the local school installations of STISets Win are no longer used. Those districts using STIHealth should continue to enter medical-related concerns in that program.

The Internet will be used to connect users to their various STISETSWeb *application servers*. No data is stored on the SETSWeb server.

System Requirements

The following applications are required to run STISETSWeb for Clients:

- Internet Access
- Internet Explorer version IE5.5 or above (I.E. 6.0 preferred), or Mozilla.
- Printer – 18-20 ppm HP Compatible (if available)
- Adobe Acrobat 6.0 or above (6.0 preferred)

The following are the minimal hardware components necessary to run STISETSWeb for Servers:

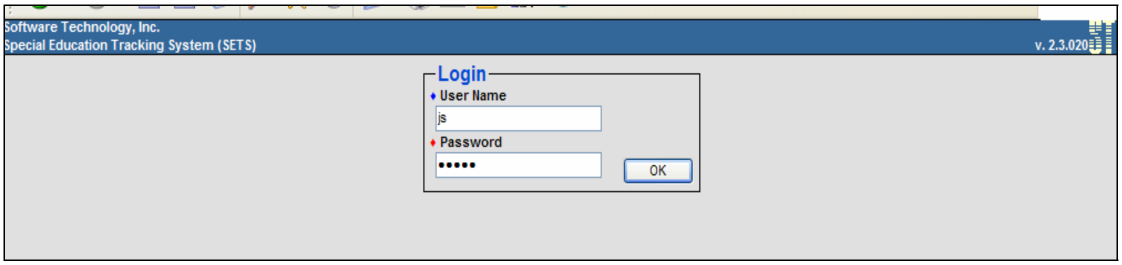
- Processor-Dual INTEL Pentium 2 GHZ – 512 Cache
- RAM- 2GB SDRAM
- Hard Disk – 18 GB (SCSI)
- Network Connection 100 MB via Switch
- Internet Access
- Internet Explorer version IE5.5 or above (I.E, 6.0 preferred), or Mozilla
- Operating System – Windows 2000/2003 Server with IIS, .NET, ASP.NET & Terminal Services
- Printer – 18-20 ppm HP Compatible (if available)
- Adobe Acrobat 6.0 or above (6.0 preferred)

Logging In

Accessing the Program via the Web

To access STISETSWeb, users must log in the program using either Microsoft Internet Explorer or the Mozilla Web browser.

- Type the STISETSWeb URL in the address bar of your browser. The login window will appear.



- Enter your User Name and Password and click **OK**.
- If you enter an incorrect User Name or Password, you will see a warning error appear with the message: *USER ERROR: Invalid user name and/or password*.

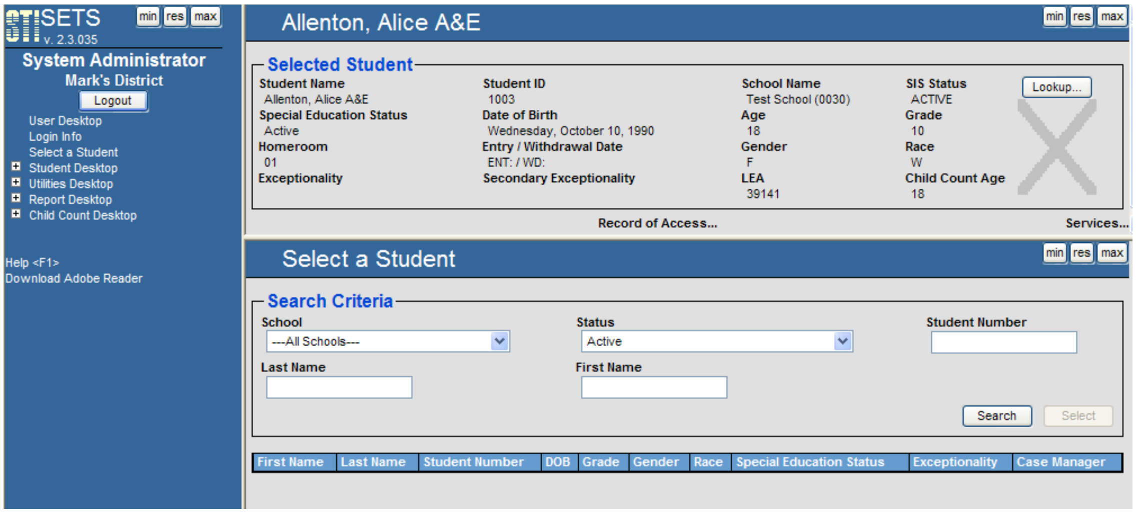
Your system administrator or manager will assign and manage all user names for your district/school. You may have a password assigned or you may create your own password. This is a district decision. By default, users with *Manager* rights will manage security for all staff members in their schools only.

The version number of the program is listed in the upper right corner of the login window. Note that the version number shown in the screen shot above, 2.x.xxx, is current as of this document's most recent edit date; this number will change with any future updates to the program.

Note: Currently, Apple machine users will use the Mozilla Firefox Web browser to utilize STISETSWeb. This free download is available at http://www.mozilla.org.

Opening Screen

The opening screen displays menu options based on an employee's level of access to the program. The opening screen is divided into three sections.



The three sections of the screen are described as follows:

- The **Menu Tree** on the left of the screen.
  - o The menu tree houses the links you will click to access different areas of the program.
  - o You may not see the same areas as another user, due to security restrictions.
- The **Selected Student** portion at the top of the screen.
  - o After a student has been selected, that student's demographic information will populate the data fields in this area.
  - o You cannot edit this demographic information in SETSWeb – changes to these fields must be made in STIOffice.
  - o Note that in the screen shot above, no student is selected. This section will appear thus immediately after you log on.
- The **User Desktop**, in the center of the screen.
  - o This will be your work area in SETSWeb.
  - o This will be the only area in which you will enter data.

Displayed in each of theses sections are three icons:

- **min**: Click the minimize button to reduce the selected section of the screen.
- **res**: Click the restore button to return the screen to its original view.

- **max**: Click the maximize button to enlarge the User Desktop window to its maximum size.

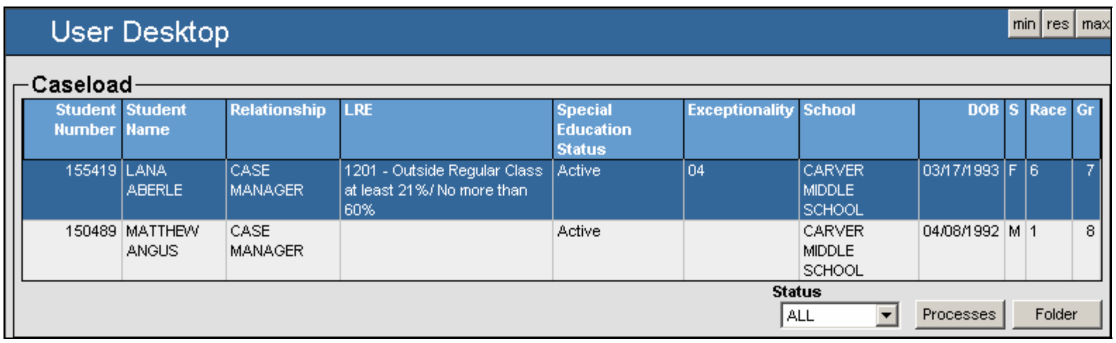
Note: Pressing the *F11* key on the keyboard will further maximize the screen. Press the key again to return the screen to its original size.

User Desktop

Desktop Overview

In the STISETSWeb User Desktop, users will see their caseloads populating the *Student Number*, *Student Name*, *Relationship*, *LRE*, *Special Education Status*, *Exceptionality*, *School*, *DOB*, *Sex*, *Race* and *Grade* fields.

A user's caseload consists of students who are associated by way of Case Management, Special Education Service and/or Related Service. The caseload will appear on the User Desktop after the user logs in to the program. When the Desktop is onscreen, the user has several ways to view students.



Relationship Designations

A user's caseload is set up based on the relationship that user has to a student. For example: If a user is a student's Case Manager, the designation *Case Manager* will appear in the *Relationship* column for that student. Additional relationships may be defined by an Administrator or Manager in the Utility Desktop. Relationships may be assigned from the **Caseload Assignment** option, outlined in the *Utilities Desktop*.

Student Information

Student demographic information is "owned" by STIOffice. This data is not editable within STISETS Web. It must be modified in the STIOffice.

Note: This information will not be displayed until a specific student is selected.

When a student is selected, the following data fields will pre-populate the student's folder:

- **Student Name**: Pulled from STIOffice.
- **Student Pictures** (if available): Pulled from STIOffice. If your school does not use pictures, this area will display as a large **X**.

- **Student ID**: Pulled from STIOffice.
- **School Name and Code**: Pulled from STIOffice.
- **SIS (Student Information System) Status**: The student's status in STIOffice. If a student is marked *Inactive* or *Withdrawn* in STIOffice, the SIS status will be *Inactive*.
- **Special Education Status**: The status of the student within STISETSWeb. This is set within the student folder in STISETSWeb.
- **Date of Birth**: Pulled from STIOffice.
- **Age**: Pulled from STIOffice.
- **Grade**: Pulled from STIOffice.
- **Homeroom Number**: Home Room is set up in STIOffice. Home Room teachers are not displayed in SETSWeb.
- **Entry/Withdrawal Date**: This will list the entry/withdrawal dates entered in STIOffice.
- **Gender**: Pulled from STIOffice.
- **Race**: Pulled from STIOffice.
- **Exceptionality**: Must first be set in the student folder within SETSWeb.
- **Secondary Exceptionality**: Must first be set in the student folder within SETSWeb.
- **LEA Number**: District Number; pulled from STIOffice.
- **Child Count Age**: Calculated based on student's birth date and Child Count Date.

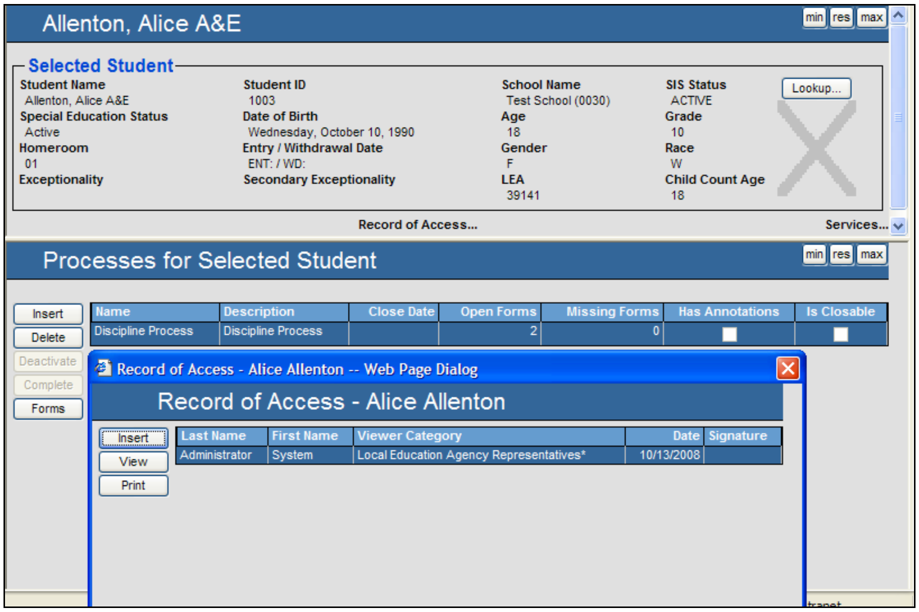
Note: The school system must define its Child Count Date in the Utilities Desktop.

- **Lookup**: The **Lookup** button provides quick access to your User Desktop from anywhere in the program.

Record of Access

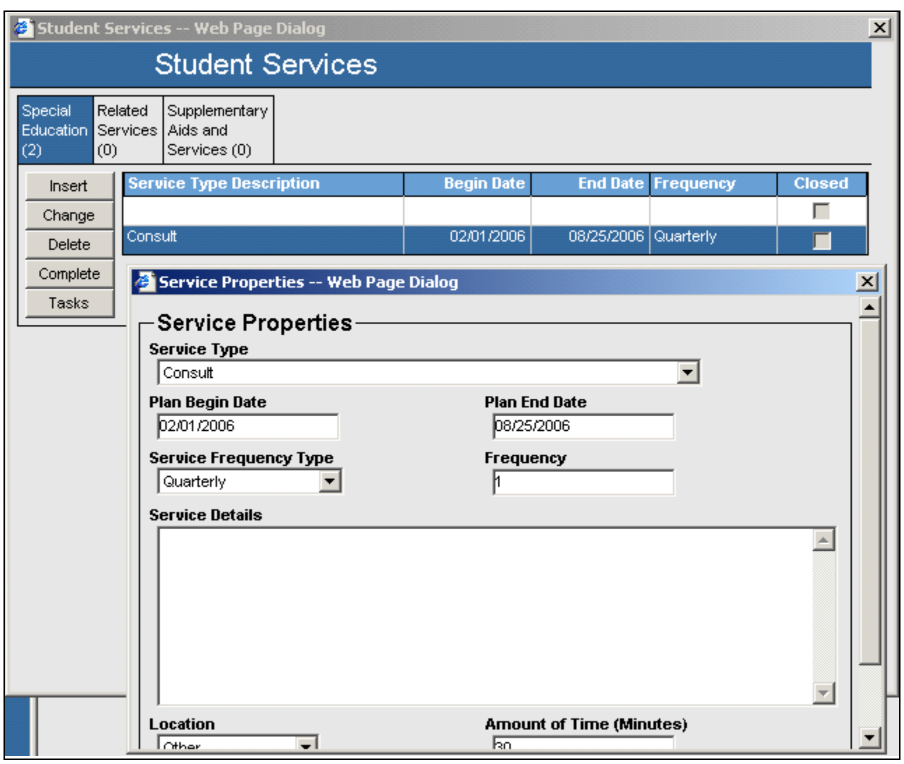
A **Record of Access** link is provided at the bottom of the *Selected Student* window (this link will be active only when a particular student has been selected). This feature is used to track individuals who view the selected student's Special Education information. Click on this link to view and add entries to the electronic record of access. You have the ability to **Print** the record of access here or from the Reports Desktop. Note that the *Date* and *Signature* fields are required.

STISETSWeb is designed to create automatic entries for any user who selects a student for which he/she is not the Case Manager.



Services

The **Services** link provided in the bottom right hand corner allows the user to view the selected student's Special Education Services, Related Services and any Supplementary Aids.



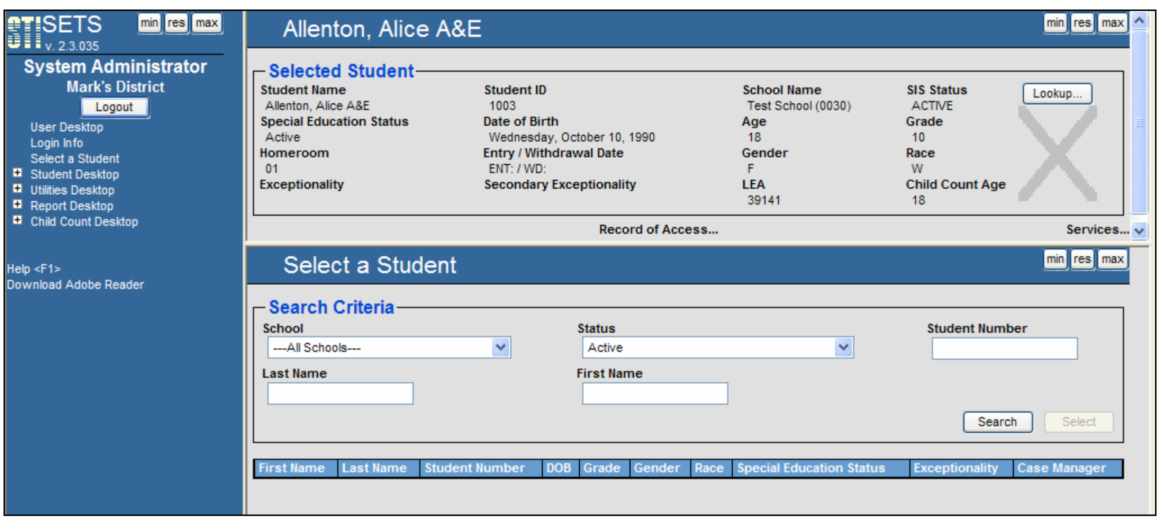
For more information about student services, see the section “Student Services” on page 20.

Selecting a Student

When the program is opened, the student demographic section of the screen will not be populated with data until a specific student is selected. Once a student has been selected, that student’s information will be displayed at the top of the screen.

A student may be selected in one of three ways:

- In the opening screen, the **User Desktop** that houses the teacher’s caseload is displayed. To begin work immediately on student forms, double-click on any student’s name. This will bring up the selected student’s **Process Manager**, which provides immediate access to student forms.
- A second way to locate one of your caseload students is to click the **Lookup** button on the *Selected Student* area of the screen.
- Another method of selecting a student is to use the **Select a Student** link on the left side of the screen. To do this:
    - o Click on **Select a Student**. A search screen will appear, allowing you to search for students based on parameters including *School*, *Status*, *Student Number*, *Last Name*, *First Name* and students who are *archived only*. **Select a Student** is reserved by default only to Administrators and Managers.



Student Search Criteria

- <u>**School**</u>: Click the drop-down arrow and select a school. Most users will only see the schools to which they have access rights. An Administrator will see all schools; a Manager will see the school connected to his/her employee file.
- <u>**Status**</u>: Click the drop-down arrow to select the student’s Special Education status. Remember that the <u>highlighted</u> option will be selected.

- *Active* refers to all students currently receiving Special Education services.
- *Archive*
- *Contracted* refers to students in Active status who are receiving services outside of the district.
- *Delete* status indicates that the student is no longer receiving Special Education services. The student's Special Education record has been deleted.
- *Inactive* refers to students who have left the school/LEA (includes students who have been dismissed or who have graduated).
- *In-State* Inactive status refers to a student who has transferred from within the state. Used when a transfer student enrolls but Special Education records have not been received for that student.
- *Not Eligible* indicates students who have been referred for Special Education services but have been identified as ineligible.
- *Out-of-State* Inactive status refers to a student who has transferred from out-of-state. Used when a transfer student enrolls but Special Education records have not been received for that student.
- *Referred* indicates students who have been referred for Special Education services but have not yet been determined eligible.

- **Student Number**: Enter the Student Number, if known.
- **Last Name**: Enter the first few letters of the student's last name. You may enter only the first letter of a last name to search a larger group of students.
- **First Name**: Enter the first few letters of the student's first name. You may enter only the first letter of a first name to search a larger group of students.
- **Archived Only**: Check this box to search only for students who are archived within STISETSWeb.
- **Search Button**: Submits search data.

Student Search Instructions

After entering (or choosing) a value for all applicable fields, click on the **Search** button to locate the student or to view a narrowed list of students to choose from. At least one field must be populated in order to run the search.

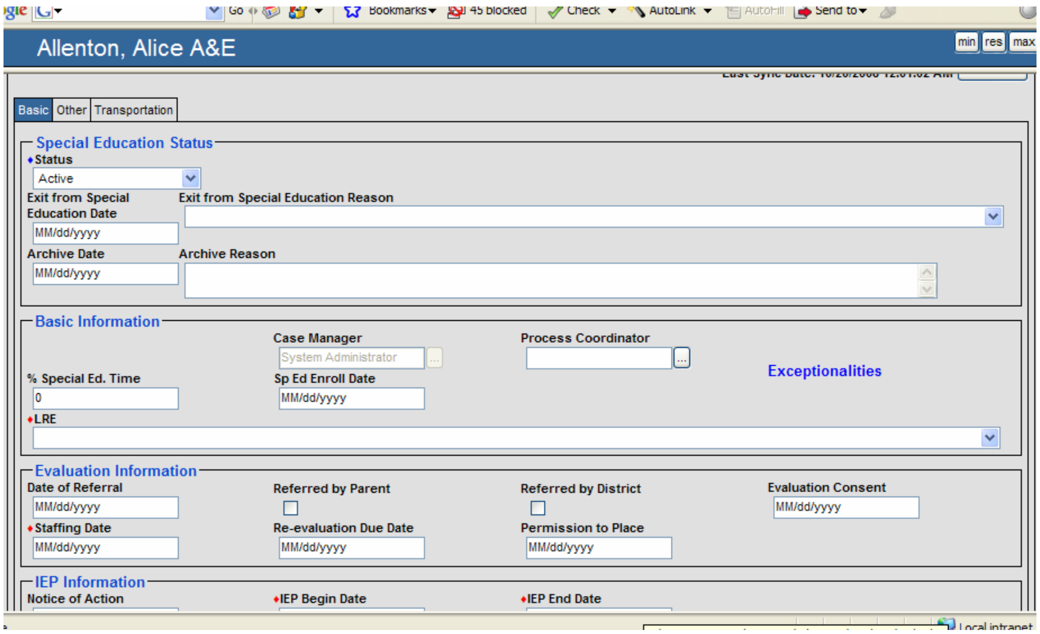
To open a student's record, you must either select or highlight the appropriate student and then click **Select**, or you may double-click directly on the student's name.

The student's information will now be displayed at the top of the screen.

Student Desktop

Student Folder

The student folder houses dates to be monitored for compliance. Many of these fields will auto-populate from forms that are completed in a process.



Three tabs are provided for viewing data in the student folder:

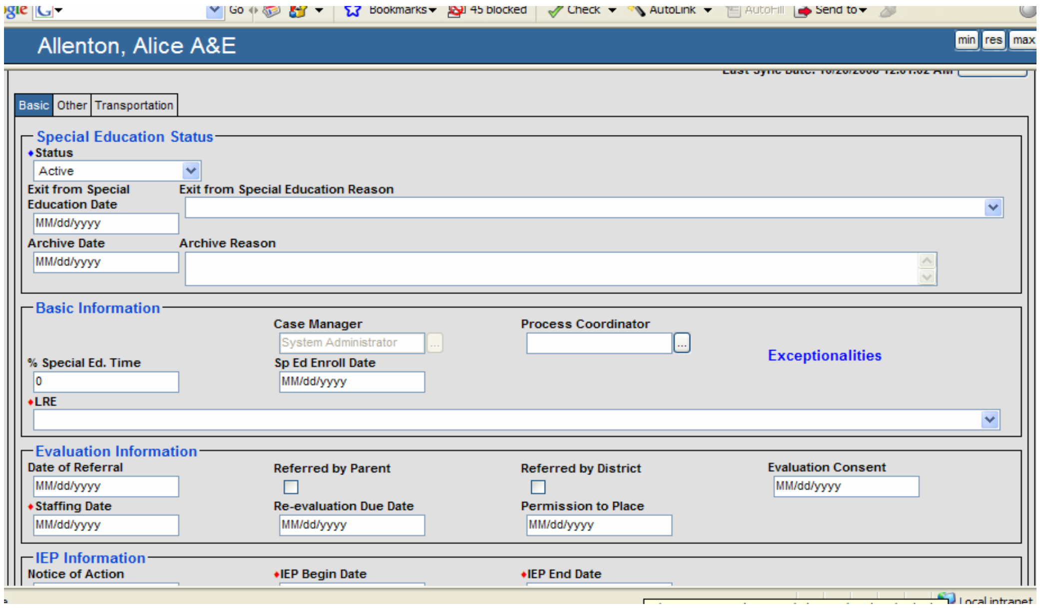
- **Basic**
- **Other**
- **Transportation**

Saving Folder Information

Click the **OK** button or press the *F10* key on the keyboard to save information changed within any folder tab.

Basic Tab in Student Folder

Click this tab to display student information as described below.



Basic Information

- **<u>Special Education Status</u>**: Click the drop-down arrow to select a status of *Active*, *Inactive*, *Not Eligible*, or *Referred.* Remember that the <u>highlighted</u> option will be selected.
  - *Active* refers to all students currently receiving Special Education services.
  - Archive
  - *Contracted* refers to students in Active status who are receiving services outside of the district.
  - *Delete* status indicates that the student is no longer receiving Special Education services. The student's Special Education record has been deleted.
  - *Inactive* refers to students who have left the school/LEA (includes students who have been dismissed or who have graduated).
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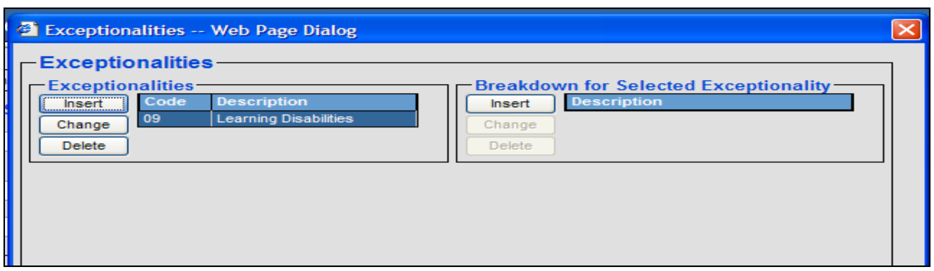
  - *Out-of-State* Inactive status refers to a student who has transferred from out-of-state. Used when a transfer student

enrolls but Special Education records have not been received for that student.

- o *Referred* indicates students who have been referred for Special Education services but have not yet been determined eligible

- **Date Exited from Special Education**: Enter the date on which the student exited from Special Education
- **Exited From Special Education Program**: Select the appropriate Exit Reason from the drop-down box.
- **Archive Date**: Enter date when student was archived.
- **Archive Reason**: Text box to enter reason why student was archived.
- **Case Manager**: The name of the teacher who will be responsible for maintaining the selected student's Special Education record will be displayed here.
- **Process Coordinator**
- **Exceptionality**: Click the **Exceptionalities** link in the upper right corner of the *Basic* screen to display the screen below:

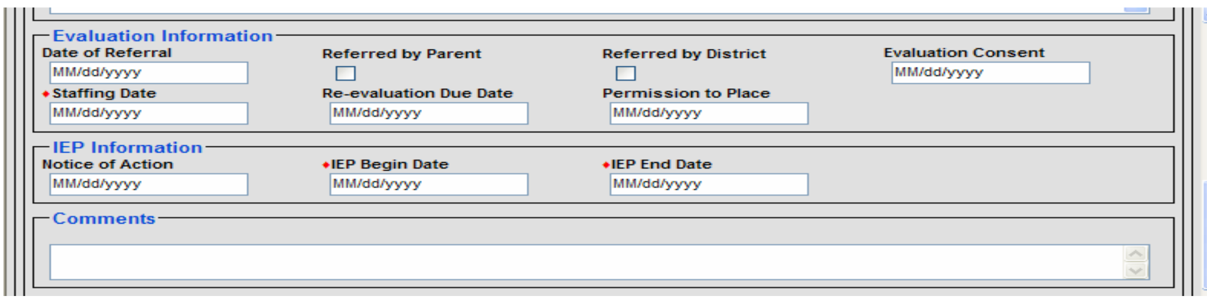


- Click **Insert** and then select the student's Primary Exceptionality from the drop-list:
  - o Autism
  - o Deaf and Blindness
  - o Emotional Disturbance
  - o Hearing Impaired
  - o Mental Retardation
  - o Orthopedic Impairment
  - o Visual Impairment
  - o Traumatic Brain Injury
  - o Language or Speech Impaired
  - o Other Health Impairment
  - o Multiple Disabilities: Hard Code breakdowns include Mental Retardation, Orthopedic Impairment, Blindness, Other Health Impairment, Other (with a textbox for description
  - o Developmental Delay
  - o Specific Learning Disabilities: Hard Code breakdowns include Basic Reading Skills, Reading Comprehension, Written

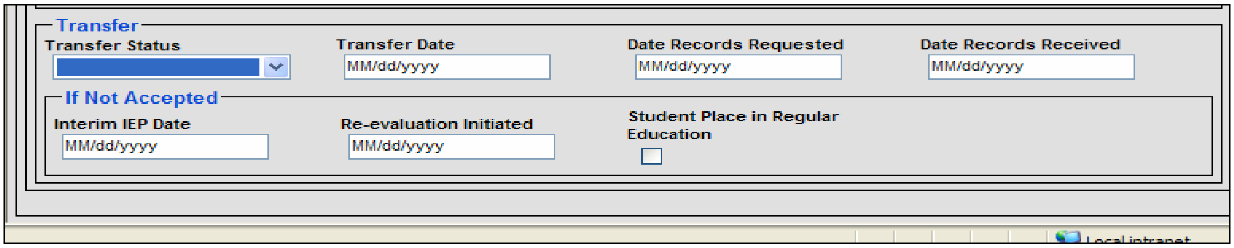
Expression, Mathematics Calculation, Mathematics Reasoning, Listening Comprehension, and Oral Expression.

- Click **OK**.
- **LRE**: Select the student's Least Restrictive Environment category here.
- **Process Coordinator**: Click the ellipsis to select the Process Coordinator.
- **% Special Education Time**: Enter the student's % Special Ed. Time.
- **Date Enrolled in District for Special Education Services**: Type in the applicable date here.

Note: Changes to the Case Manager must be edited in the Student Desktop by authorized users only.

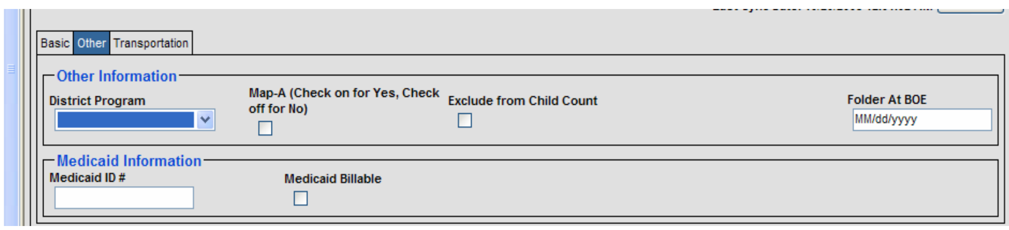


- **Date of Referral**: This field populates from the Completed Referral Form or it may be manually entered.
- **Referred by Parent**: Enter date if Parent Referred student for Special Ed if applicable.
- **Referred by District**: Enter date if District Referred student for Special Ed if applicable.
- **Evaluation Consent**: This field does not auto-populate from any forms. The user must manually enter this date.
- **Staffing Date**
- **Reevaluation Due Date**: Auto-calculate 3 years minus 1 day from Initial Evaluation Date or Reevaluation Date, with option to change.
- **Permission to Place**: Type in date for Permission to Place.
- **Notice of Action**: The user must manually enter this date.
- **IEP Begin Date**: This field populates from the completed IEP Program Summary Page or it may be manually entered.
- **IEP to End Date**: This field populates from the completed IEP Program Summary Page. The program defaults to the IEP Initiation date plus one year, minus one day.
- **Comments**: The is a manual field entry



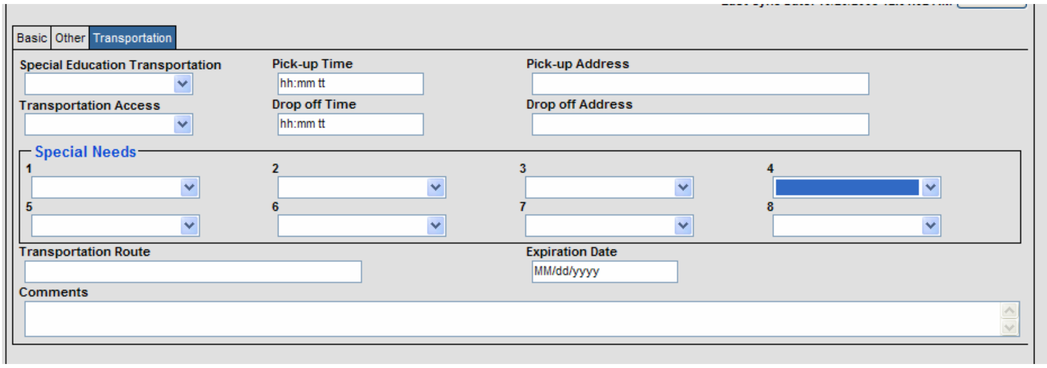
- **Transfer Status**: Select from drop-down box.
- **Transfer Date**: Enter the date on which the student transferred to this school district.
- **Date Records Requested**: Enter Date Special Education records were requested.
- **Date Records Received**: Enter Date records were received from previous district.
- **Interim IEP Date; Enter date**
- **Re-Evaluation Initiated: Enter the date**
- **Student Place in Regular Education**: Check box if student has been placed in Regular Education.

Other Tab in Student Folder



- **District Program**: Select from the Drop Down box which Map-A: Check box for Yes, Uncheck Box if No Exclude from Child Count: Check box if student is to be excluded from Child Count
- **Folder At BOE**: Enter the appropriate date here.
- **Medicaid ID#**: Enter Medicaid ID number if applicable.
- **Medicaid Billable**: check box if Medicaid is billable

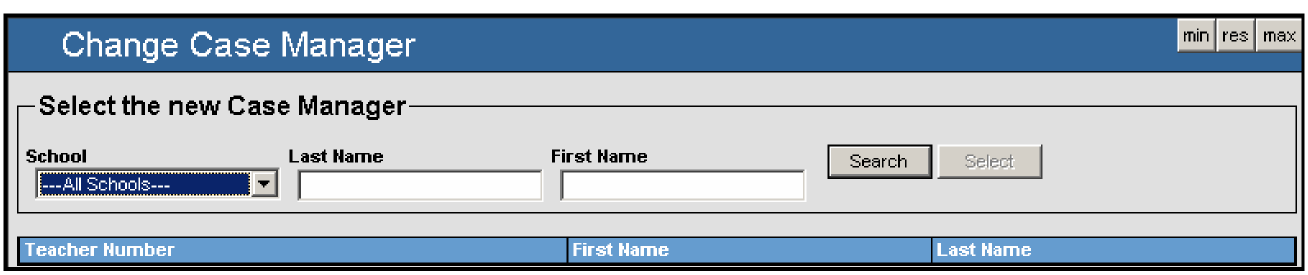
Transportation Tab in Student Folder



- **Special Education Transportation**: Use the drop-list to select a Special Education Transportation need if applicable.
- **Pick-up Time**: Enter student pick-up time by hours, minutes.
- **Pick- up Address**: Enter the address at which the student is to be picked up.
- **Transportation Access**: Select appropriate item from the drop-list.
- **Drop off Time**: Enter appropriate time at which student is to be dropped off.
- **Drop off Address**: Enter drop-off address for student.
- **Special Needs**: Select from the appropriate number s all that apply.
- **Transportation Route**: Enter transportation route details if desired.
- **Expiration Date**: Enter the date on which the Special Ed Transportation expires.
- **Comments**: Enter any desired comments regarding this record.

Change Case Manager

This option allows the user to change a student's Case Manager. By default, only users with *Administrative* or *Manager* rights will have this option.

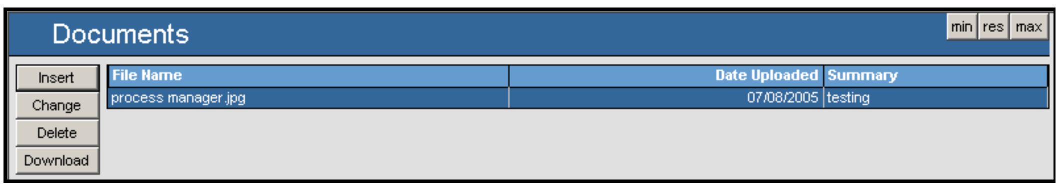


- You must first display a student's name in the selected student portion of the program. You may select a student using any of the following methods:

    - In the initial *User Desktop* screen that houses the teacher's caseload, double-click on the desired student's name.
    - A second way to locate one of your caseload students is to click the **Lookup** button on the *Selected Student* area of the screen.
    - Another method of selecting a student is to use the **Select a Student** link on the left side of the screen.
- Now by selecting the **Change Case Manager** menu option, the user may search by *School*, *Last Name* or *First Name.* Enter the desired criteria and click **Search**.
- When the desired employee name appears, click **Select**.

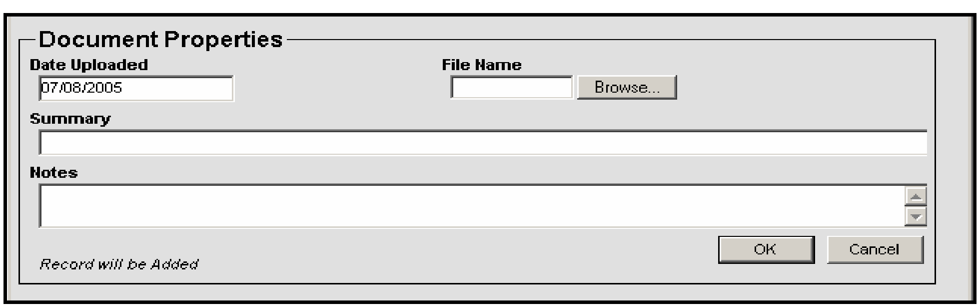
Documents

On the *Documents* screen, the user may **Insert**, **Change**, **Delete** or **Download** documents that are required at the LEA/School level. These documents are saved in the database on the district server.



- To add a document that is not already pre-installed with STISETSWeb, click the **Insert** button feature on the **Documents** Page.
- Click **Change** to change an existing document.
- Click **Delete** to delete a document.
- Click **Download** to download a previously uploaded document. Highlight the document and click *Download* to open or save the document.

Fill out the appropriate text fields in order to have your file added and uploaded. Click the **Browse** button to locate the appropriate file/document to be uploaded, and then click **OK**.



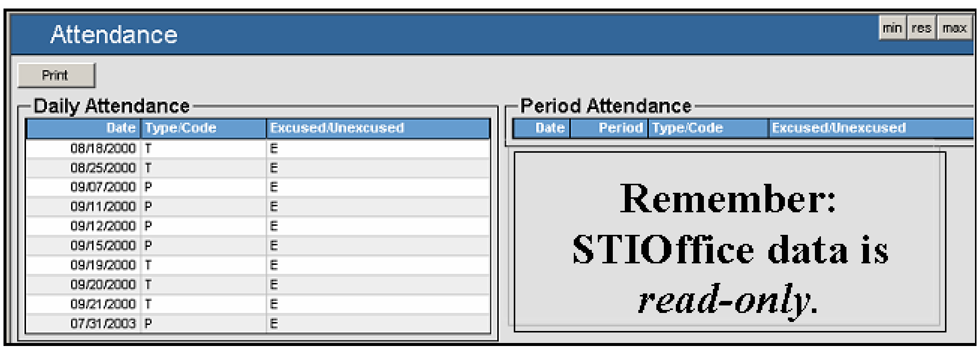
Notes may also be entered and saved in the *Notes* field, even without uploading a document.

STIOffice Info

As stated in the overview to this manual, a variety of non-Special Education information is available in STISETSWeb. This up-to-the-minute data is drawn from STIDistrict database and may be viewed by clicking the menu under *STIOffice Information* on the left side of the screen under the *Student Desktop* menu. The following types of data may be viewed in STISETSWeb if entered in STIOffice:

- **Attendance**
- **Discipline**
- **Entry/Withdrawal**
- **Schedule**
- **Grades**
- **Guardian Information**

Bear in mind that all information drawn from STIOffice is *read-only* in STISETSWeb. Any changes to this data must be made from within the STIOffice application. The Enrollment program allows for viewing of real-time attendance, discipline and entry/withdrawal information. An upload must occur in order for the remaining pieces of student information to be updated (schedule, guardian information and grades).

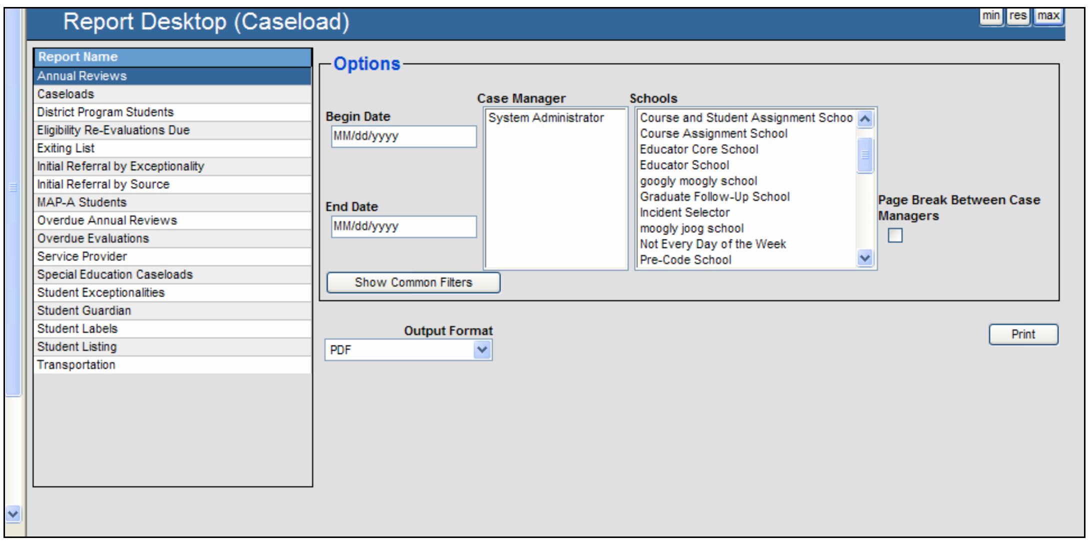


Teacher Reports

STISETSWeb provides many pre-loaded report options. Adobe Acrobat Reader (a free download) is required for report generation. Unlike reports from the *Report Desktop* that include listings for the entire school or district, these are teacher reports based on the teacher's relationship to students on his/her caseload.

Highlight the desired report on the left side of the screen.

- The user is required to select a school.
- Click the down arrow to select the *Output Format*.
    - **PDF** brings up Acrobat Reader.
    - **RTF** brings up Microsoft Word.
    - **XLS** brings up Excel Spreadsheet.

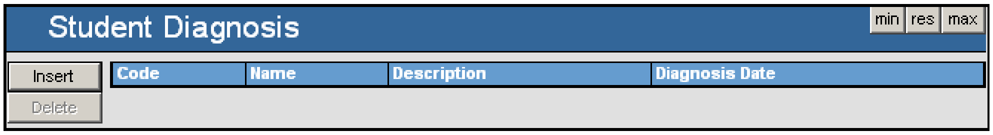


Notes on Reports

- Most of this information is drawn directly from the student folder. If the folders are not up to date, the reports may not be either.
- Reports are unique. Each one has *Ceridian* filters that must be set. Some reports must have date ranges set, and others will prompt for a specific teacher.
- The size of the mailing label is the Avery Standard 5160.

For more information on reports, please refer to the section "Report Desktop & Report Caseload" on page 45.

Student Diagnosis

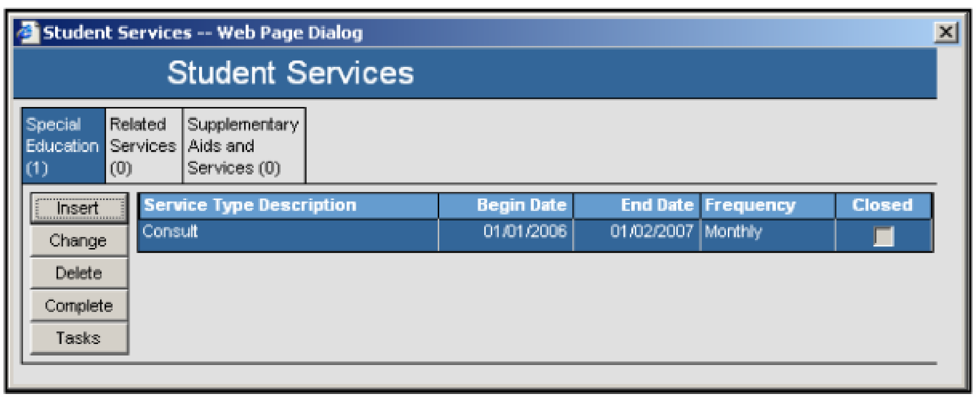


Click **Insert** to add a record for the diagnosis of a child, along with the date on which the child was diagnosed. Note that the Student Diagnosis is used with *IEP Annual Goals* page. A service may be entered without a diagnosis.

Once **Insert** has been selected, you can search for a diagnosis. The best way to search is to enter only one letter and the system will return many results.

Student Services

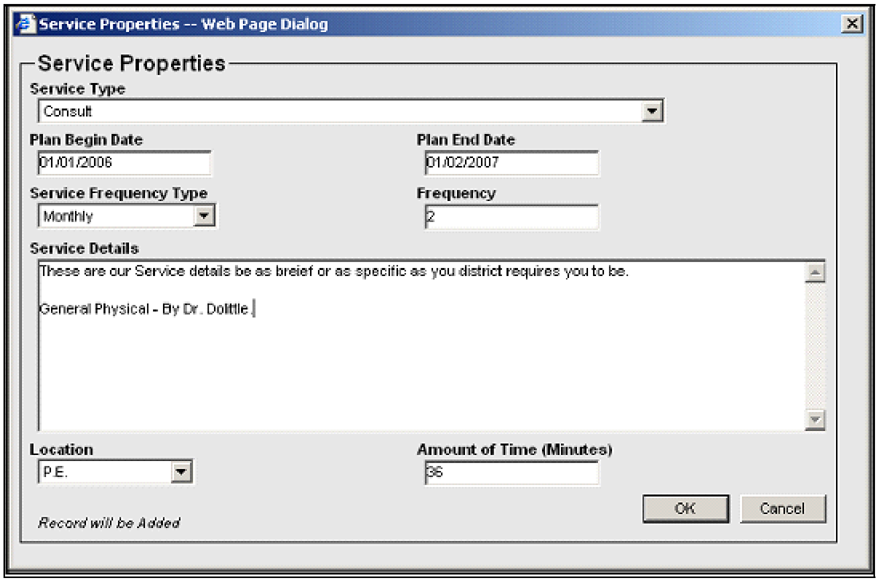
This screen is used to track Special Education Services, Related Services and Supplementary Aids and Services. Each type of service may be viewed by clicking the appropriate tab at the top of the screen. In the screen shot below, the *Special Education* tab is displayed in blue. This indicates that this tab is currently selected. The *(1)* shows that there is one record of this type for the student in the system.



Five options are currently available at the left side of the screen for adding or changing student services:

- **<u>Insert</u>**: Click this button to add a record of service.
- **<u>Change</u>**: Select a service record and click this button to make changes. Alternately, you may double-click on any record in the list.
- **<u>Delete</u>**: Delete the selected service record.
- **<u>Complete</u>**: Designates that the service has been fulfilled and may be closed.
- **<u>Tasks</u>**: All tasks for services may be entered here.

Inserting a Service

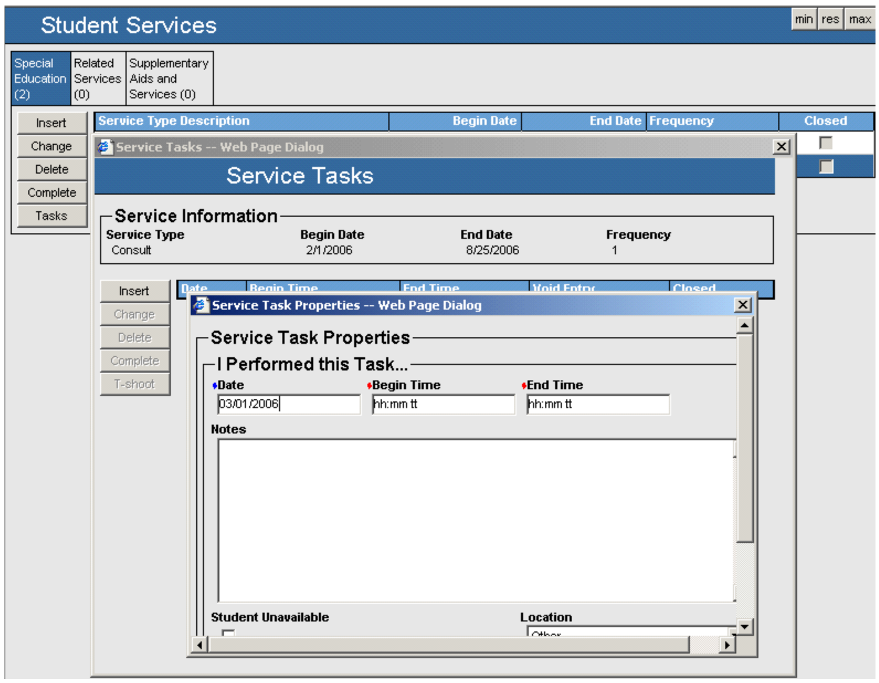


- **<u>Service Type</u>**: Select the type of service received by the student. If you need to provide a Related Service that is not in the pick list, you may add that service. To do this, go to **Utilities Desktop | Code Desktop | Service Types** and click **Insert**. Type in the *Code*, *Name* and *Description* of the Related Service needed. Click **OK** and the service will appear in the pick list.
- **<u>Plan Begin Date</u>**: Enter the starting date here.
- **<u>Plan End Date</u>**: Enter the ending date here.
- **<u>Service Frequency Type</u>**: Click the drop-down arrow to select whether the service will take place on a weekly, monthly daily, etc., basis.
- **<u>Frequency</u>**: Enter the number of occurrences within a given time. Samples of *Service Frequency Types* and *Frequency* are shown in the following table:

If the Service Should Be	Frequency Type	Frequency
Once every two months	Bi-monthly	1
Once every two weeks	Bi- weekly	1
Every day	Daily	1
Two times a month	Monthly	2
Once a quarter	Quarterly	1
Six times a quarter	Quarterly	6
Three times a day	Three times per day	1
Three times a week	Three times per week	1
Two times a day	Two times per day	1
Two times a week	Two times per week	1
Four times a week	Weekly	4
Once a year	Annually (will be added with the Medicaid update. Until then, you can define this by selecting "Quarterly" and entering the beginning and ending dates of the quarter when the service will take place.)	1

- **Service Details**: Enter any relevant information pertaining to the service, if applicable.
- **Location**: Click the drop-down menu to select a location (this is user-defined and may be changed in the **Code Desktop**).
- **Amount of Time**: Enter the amount of time (in minutes) that will be provided for the service.
- Click **OK** when finished.

Inserting a Task for a Service



- Select the correct service record and click the **Tasks** button to enter a task for that service.
- The *Date*, *Begin Time* and *End Time* of the task are all required fields.
- Check the *Student Unavailable* box (if necessary) to indicate that the student was not present for the task.
- Click the **Ellipsis** button in the lower left corner near the *Supervision Provided by* box to select the service provider.
- Click **OK** to save the task record.

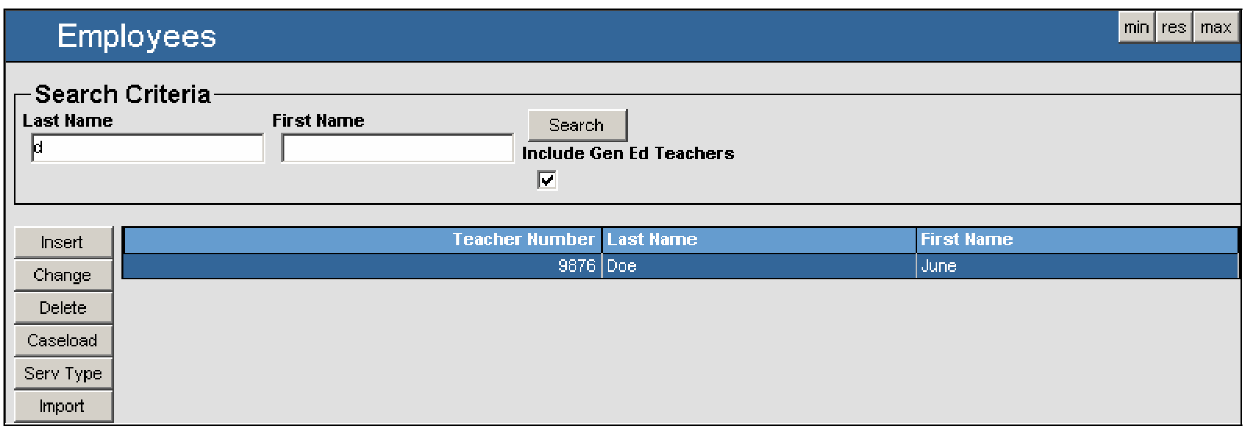
Utility Desktop

About Utility Desktop

STISETSWeb stores all maintenance features in the *Utility Desktop*. Administrators and managers have selective rights to the Utility Desktop. This section will provide helpful hints and explain how to use the feature.

Click the plus sign by the Utilities Desktop from the menu tree on the left to view all the sub-menus contained in Utilities Desktop. Since all management options are housed here, only users with administrative or manager rights have access to the Utilities Desktop.

Employees



Searching and Modifying Employee Information

To access this menu option, expand the Utilities Desktop.

- Select **Employees** in the *Utilities Desktop* menu to create records for teachers and other employees involved in Special Education.

Several options are available here:

- **Search**: Use this option to select an existing employee's record, possibly for changes or deletion. This feature is described in more detail below.
- **Insert**: Click this button to add a record for any employee who is not currently listed in the teacher file in STIOffice.
- **Change**: Select an existing record (click on it to highlight it) and click this button to modify it.

- **Delete**: Select an existing employee record and click this button to delete it from the STISETSWeb program.
- **Caseload**: Select an employee record and click this button to view the employee’s current caseload.
- **Serv Type**: Select an employee record and click this button to assign that employee the type(s) of services he or she is credentialed to provide.
- **Import**: This option may be used to transfer an employee’s demographic data from STIOffice to STISETSWeb. This feature is described in more detail below.

Search

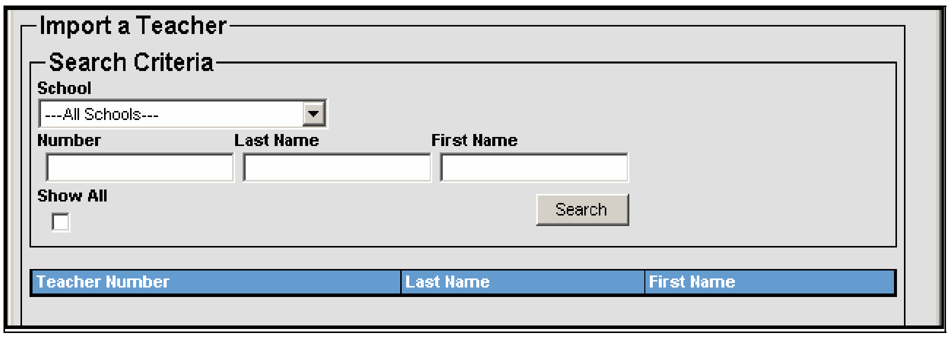
The **Search** feature allows selection of an existing employee, possibly for changes or deletion. This would be used for teachers who already have employee records in the program.

- To search for an employee, enter the first few letters of the employee’s last name and then click **Search**.
- The next step is to select the appropriate teacher. On the next screen, the listed employee information may be changed or deleted, and caseloads may be viewed. To change, delete or view caseloads, simply click the corresponding button on the left side of the screen.
- If the *Include Gen Ed Teachers* box is checked, the search will include general education teachers.
- Click **Insert** to add a new employee. The *Edit Employee Information* menu will appear. Enter employee information in the fields provided, and then click **OK** to save. This area allows addition of employees who are not listed in the teacher file in the STIOffice program.
- To modify a record for an employee who is already listed in the *Employee / Contracted Worker* pick list, highlight the employee's name in the browse box and click **Change** to the left of the screen. After changes have been made, click **OK** to save.
- To delete an employee, highlight the employee and click the **Delete** button to the left of the screen. Deletion of an employee is not allowed as long as the employee has at least one student on his/her caseload.

Importing Employees from STIOffice

The **Import** feature is used to transfer an employee's demographic data from STIOffice to STISETSWeb. If an employee has been manually inserted into STISETSWeb, the employee will not be listed when you search the import function.

The import option may be searched in two ways. The *Show All* checkbox differentiates between the two. By default, the *Show All* box is left unchecked, which means that the user is searching only for employees who have NOT been imported to STISETSWeb from STIOffice. If the *Show All* box is checked, the user will search for employees who have been imported already as well as employees who have not yet been imported.



- Click **Import** to add employees who are listed in the teacher file in the STIOffice program.
- **Search** allows selection of an existing employee in the teacher file of the STIOffice program. In other words, these teachers have already had employee records created.
    - To search for an employee, enter the first few letters of the employee's last name and then click *Search.*
    - Click **OK** to add the employee file.

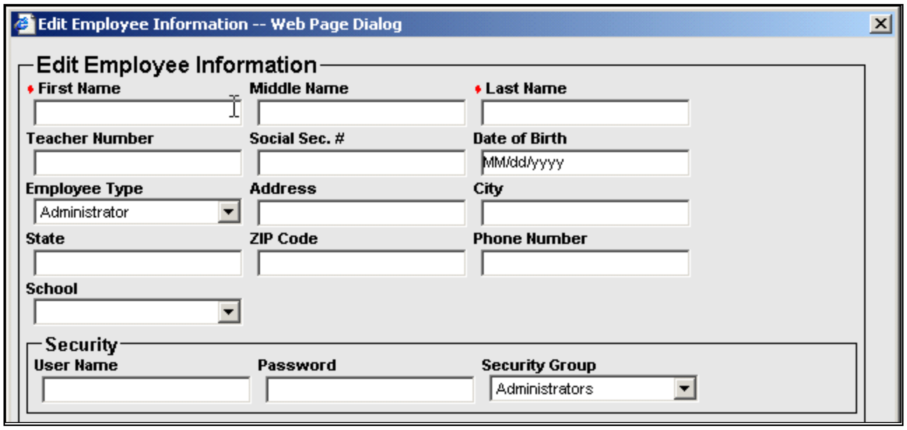
Inserting New Employee Records

Insert allows addition of employees who are not listed in the teacher file in the STIOffice program.

- Click **Insert** to add a new employee. The *Edit Employee Information* screen will appear.
- Enter employee information in the fields provided. Required fields for new employee records are: *First Name*, *Last Name*, unique *Teacher Number*, *Employee Type*, *School*, *User Name*, *Password* and *Security Group*.

Note: Make sure the Teacher Numbers used in STISETSWeb match the Teacher Numbers in STIOffice.

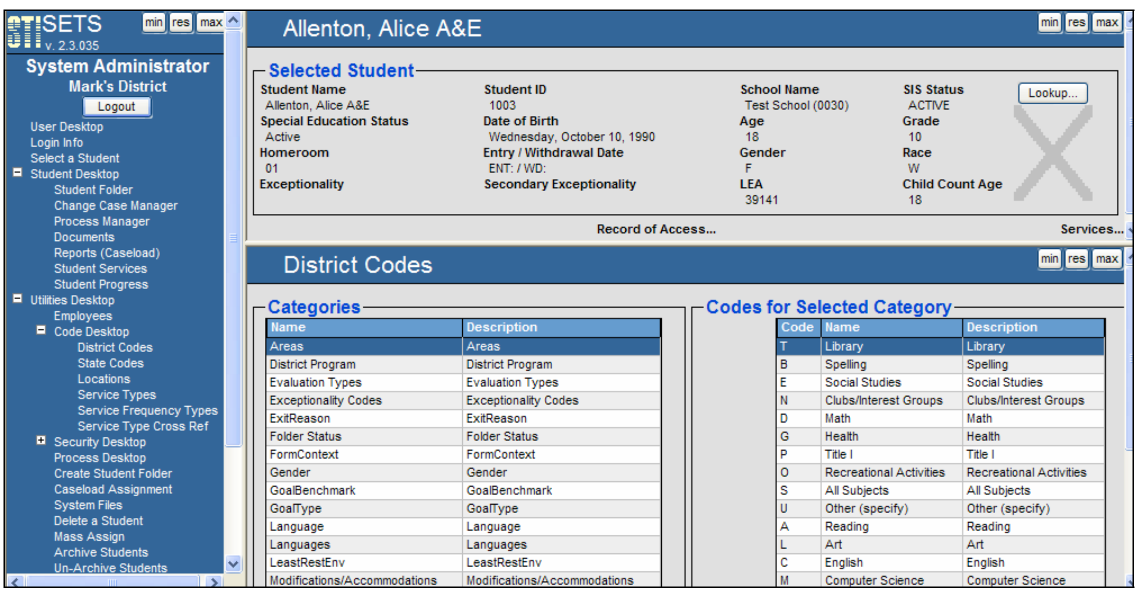
- Click **OK** to save the record.



- Click **Caseload** to view the Caseload assignment for the selected employee.

Code Desktop

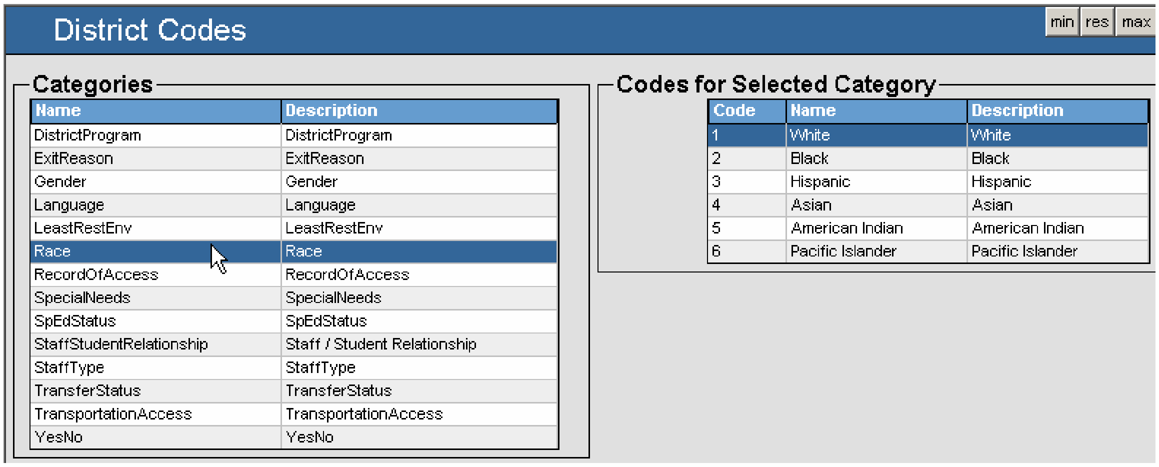
The *Code Desktop* houses all the codes used in the software. These codes are available for selection by users via drop-down lists throughout the program. To view or modify any of these codes, expand the menu tree under **Utilities Desktop | Code Desktop**, as shown below, and click on the type of code (*District*, *Locations*, *Service Types*, etc.) desired.



The code *Categories* within each selected type will be listed on the left side of the desktop. Select any category in the list and all codes within that category will then display on the right.

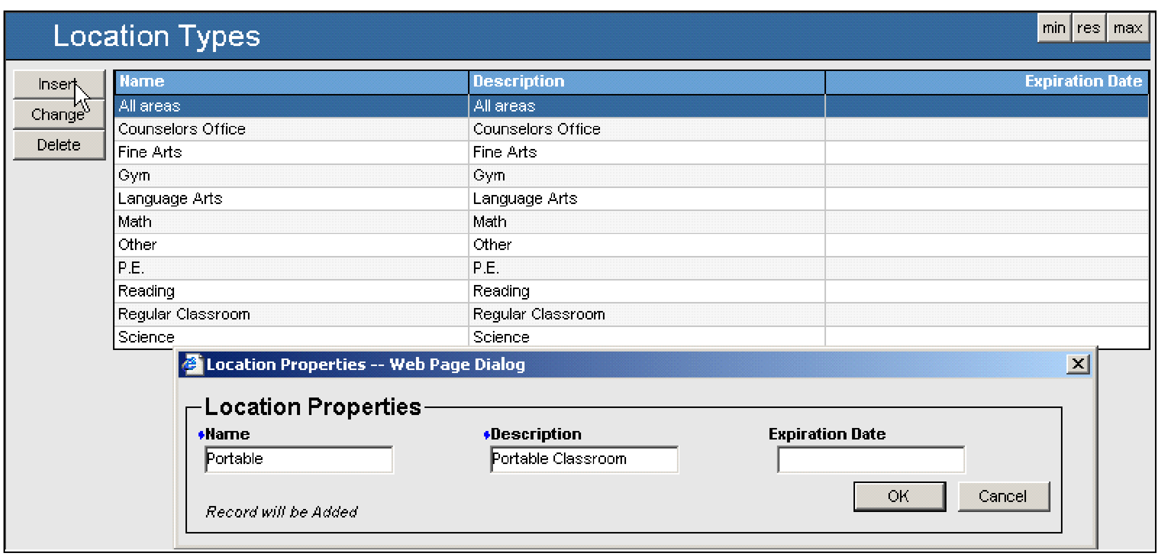
District Codes & State Codes

Currently, district codes and state codes are the same.



Location Codes

Locations codes are used with **Services**. These codes will populate the drop-down list for *Service Locations*. Only users with administrator rights may modify these codes. Examples are shown in the following screen shot.

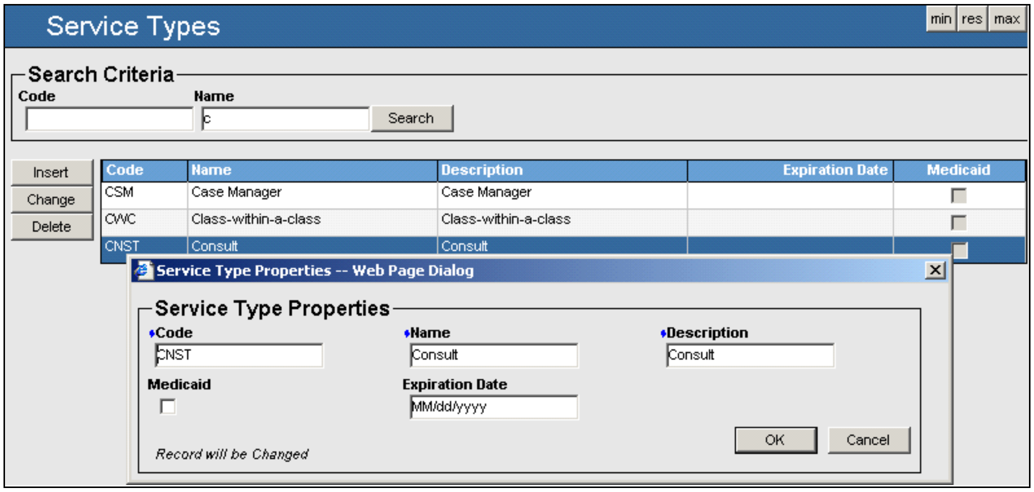


- Click **Insert** or **Change** to access the following fields:
  - Name: Title of the location
  - Description: Any notes you have on this location.
  - Expiration Date: (optional) The last date on which this location will be used.
- Click **Delete** to remove a selected location.

Service Type Codes

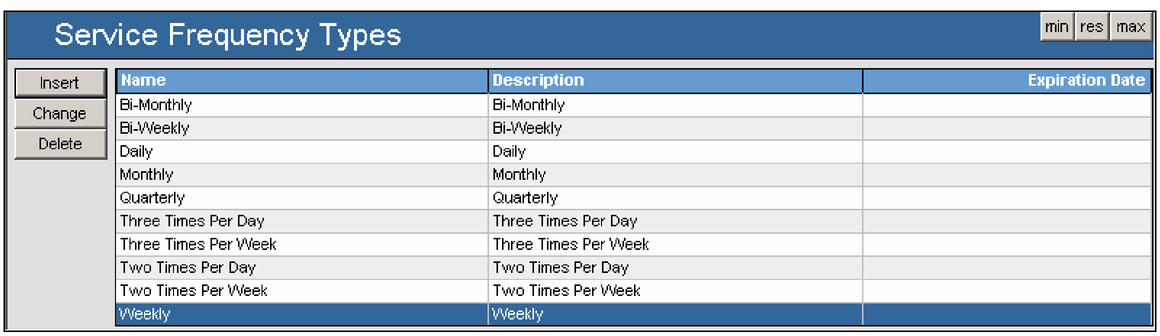
Administrators may select this option to view/edit the various Service Types available in STISETSWeb.

Here the administrator may add any Related Services that are not already listed in the *Services* list. Type in the *Code*, *Name* and *Description* of the Related Service needed. Click **OK** and the service will appear in the list.



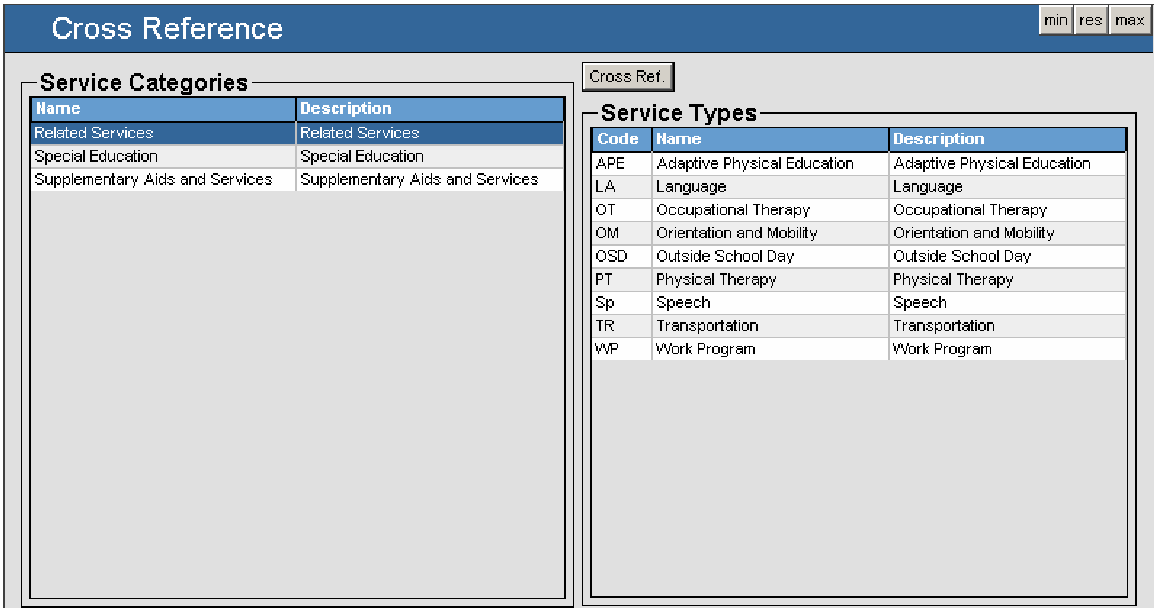
Service Frequency Type Codes

These codes are used to select the frequency at which the service will take place: on a weekly, monthly, daily basis, etc.

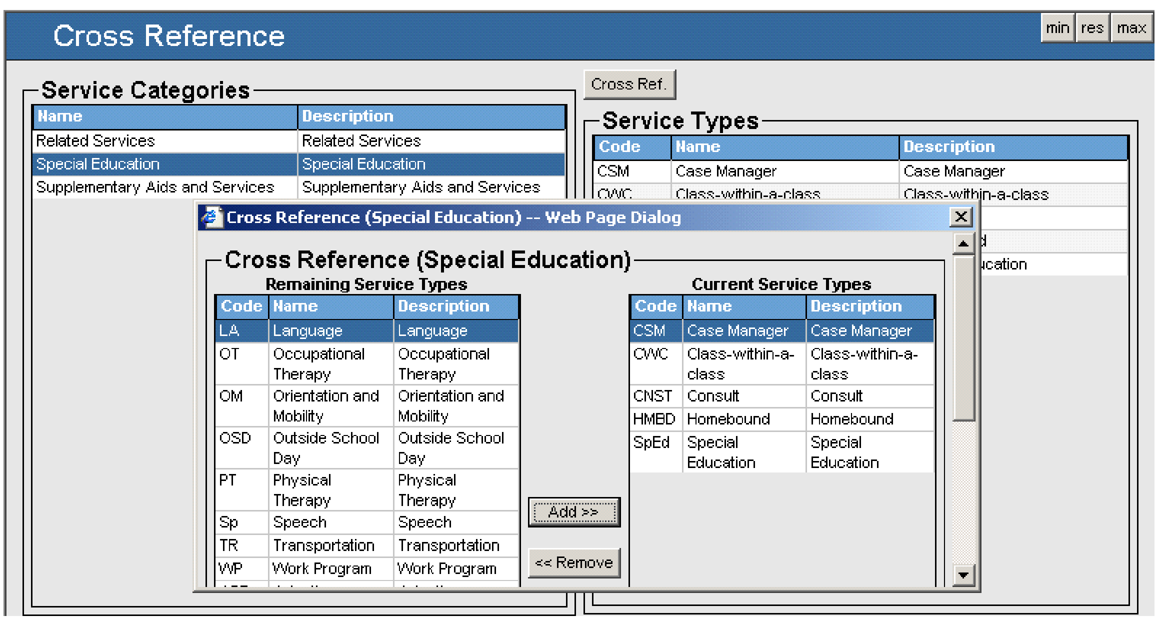


Service Type Cross Reference

This screen is used to associate Service Types with Service Categories. The Service Types listed in the box on the right will correspond with the Service Category selected on the left.



- Select a Category and click the **Cross Ref** button to edit the cross references.



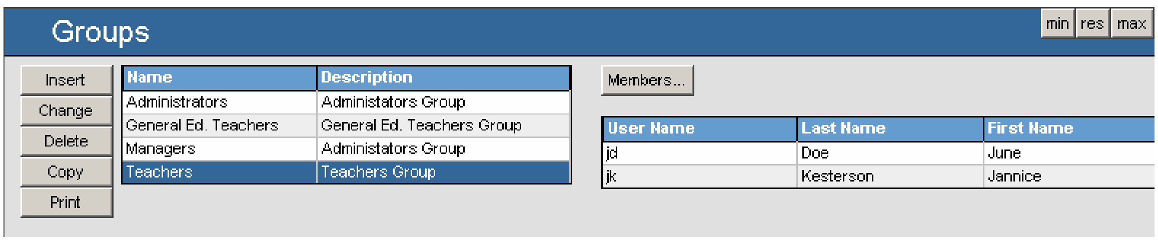
- All Current Service Types associated with the selected Category are listed on the right. To remove one of these, select it and click the

<<Remove button. The Service Type will then move to the box on the left.

- All items listed in the Remaining Service Types box on the right are available to be associated with the selected Category. Select any one of these Service Types and click **Add>>** to move the item to the Current Service Types box on the right.
- Be sure to click **OK** to save any modifications made on this screen.

Security Desktop

Groups



Security roles or groups are defined by the user's level of access to the program. This screen provides views of: *Groups*; *Users* in the Groups; and *Group Set-Up*. As a group is highlighted in the left box, the users in the selected role are displayed in the right box.

USERS WHO ARE NOT ASSIGNED SECURITY ROLES WILL HAVE NO OPTIONS UPON LOGGING INTO THE PROGRAM.

- **Insert**: Insert new security roles names and descriptions.
- **Change**: Change the name and the description of security roles.
- **Delete**: Delete a security role from the list.
- **Members**: Add or remove users from the highlighted Security Role list.
- **Copy**: Creates a duplicate group for the group selected.
- **Print**: Allows you to print the effective permissions for a selected group.

Members… Button

- Select or highlight the group desired.
- Click on the **Members…** button to view remaining members and current members.
  - To add a member: Highlight the name of the employee to add to the selected group and then click the **Add** button.
  - To remove a member: Highlight the name of the employee to remove from the selected group and then click the **Remove** button.
- Click **OK** to save these changes or click **Cancel** to exit without saving.

Predefined User Groups List

Predefined groups and their default access levels are listed below.

Administrators

- **User Desktop**: Full Access
- **Student Desktop**: Full Access
- **Student Folder**: Full Access
- **STIOffice**: Full Access
- **Process Desktop**: Full Access
- **Utility Desktop**: Full Access
- **Report Desktop**: Full Access

General Education Teachers

The System Administrator must define the rights for the General Education Teachers Group. This group by default has no right assigned.

- **User Desktop**: No Access
- **Student Desktop**: No Access
- **Student Folder**: No Access
- **STIOffice**: No Access
- **Process Desktop**: No Access
- **Utility Desktop**: No Access
- **Report Desktop**: No Access

Managers

- **User Desktop**: Full Access
- **Student Desktop**: Full Access
- **Student Folder**: Full Access
- **STIOffice**: Full Access
- **Process Desktop**: Full Access
- **Utility Desktop**: No Access
- **Report Desktop**: Full Access

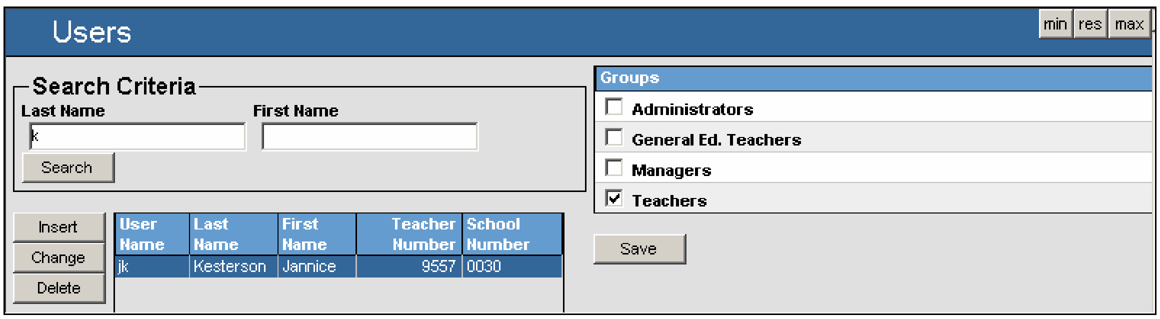
Teachers

- **User Desktop**: Full Access
- **Student Desktop**: Full Access
- **Student Folder**: Full Access
- **Process Desktop**: Full Access
- **Documents**: Full Access

- **STIOffice**: Full Access
- **Process Desktop**: No Access
- **Utility Desktop**: No Access
- **Report Desktop**: Full Access

Users Menu

The *Users* menu is accessed by selecting **Utility Desktop | Security Desktop | Users**. This area of the program is used to create users and assign security roles to them. As each user name is highlighted in the box on the left, the corresponding group(s) will be displayed on the right. REMEMBER: Security roles must be assigned to users before they may access any menus in the program.



Search

- Use the **Search** option to locate any previously created users.

Insert/Change/Delete

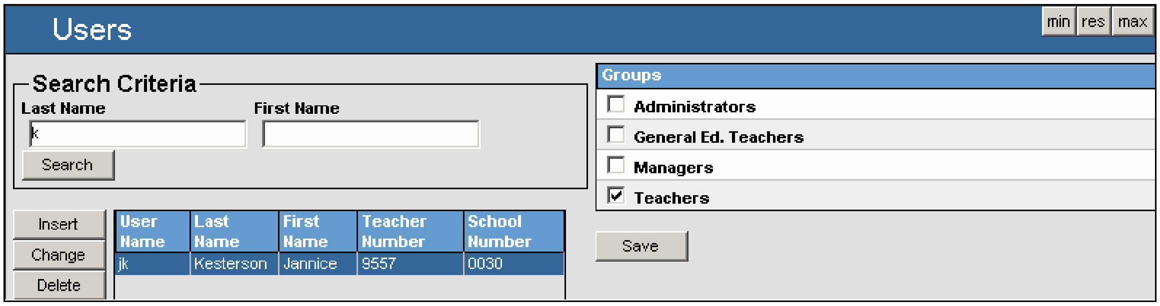
- Click **Insert t**o add a new user.
- Click **Change** to change an existing user's User Name and/or Password.
- Click **Delete** to delete a user.

Adding a New User

- Click **Insert** and then click on the plus sign to display the *Search* screen. Enter the search parameters here.
- The next screen will display a browse box containing all the employees who meet the search criteria. Highlight the name of the desired employee and then click **Select**.
- Create a User Name for the staff member; assign and confirm a password. There are several new security options on passwords. These features are optional:
  - User must change password at next login.
  - User cannot change password.
  - Password never expires.

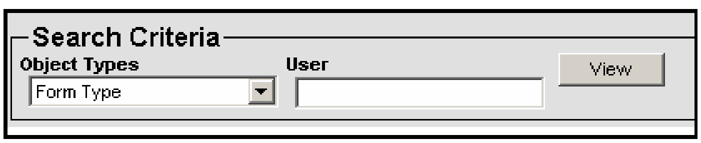
Assigning Security Role(s)

- After a user is created, the next step is to assign a Security Role. To do this:



  - Highlight the name of the user in the left box.
  - Click the appropriate checkbox on the right side.
  - Click **Save**.
  - If the user requires more than one Security Role, repeat the above steps.

Effective Permissions



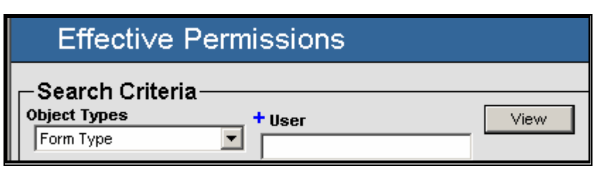
This is a tool for viewing individual user permissions. No modifications to permissions are allowed from this menu option. For details about editing permissions, please see "Edit Permissions" on page 34.

- **Object Types**: Three different classifications of security in STISETSWeb.
- **User**: User whose permissions are to be viewed.

Viewing an Employee's Effective Permissions

Select one of three options from the *Object Type* drop-down list:

- **Form Type**: This shows access rights to forms for the selected user.
- **Menu Item**: This shows menu option rights for the selected user.
- **School**: This shows the schools to which the user has access.



- Click the blue plus icon near the upper left corner of the field to select a user. A Search screen will appear.
- To search for an employee, enter the first few letters of the employee's last name and then click **Search**.
- Select (highlight) the appropriate name and click **OK** to continue.
- After the *Object Type* and *User* are selected, *Effective Permissions* will be displayed at the bottom of the screen.
- To refresh the page, click **Load**.

Edit Permissions

This is a tool for locking down and editing permissions for entire groups of users. This will allow the System Administrator to edit the permissions of a particular group more precisely.

- **Object Types**: Three different classifications of security in STISETSWeb.
- **Groups**: Group whose permissions are to be viewed.

Modifying an Employee's Effective Permissions

Select one of three classifications from the *Object Type* drop down box:

- **Form Type**: This shows access rights to forms for the selected user.
- **Menu Item**: This shows menu option rights for the selected user.
- **School**: This shows the schools to which the user has access.
- Continue by selecting the *Group* whose permissions are to be edited.
- After the *Object Type* and *Group* have been selected, click **Load**. The *Effective Permissions* will be displayed at the bottom of the screen.
- To modify permissions, examine the *Object Type* in the far left column, Select the corresponding security access checkbox. An empty checkbox means the user does not have access to the equivalent Security Access option.

Security Object checkbox options include:

- **Form Type**
  - Full Control: A user will be able to Amend, Complete, Save, Delete, Create and Read the selected forms for students.
  - Amend: User may create an Addendum for a child or modify a completed form.
  - Complete: User may complete a form.
  - Save: User may save any changes made in the selected form.
  - Delete: User may delete the selected form.

- o <u>Create</u>: User may add a new form to a process.
- o <u>Read</u>: User has view-only rights to forms.

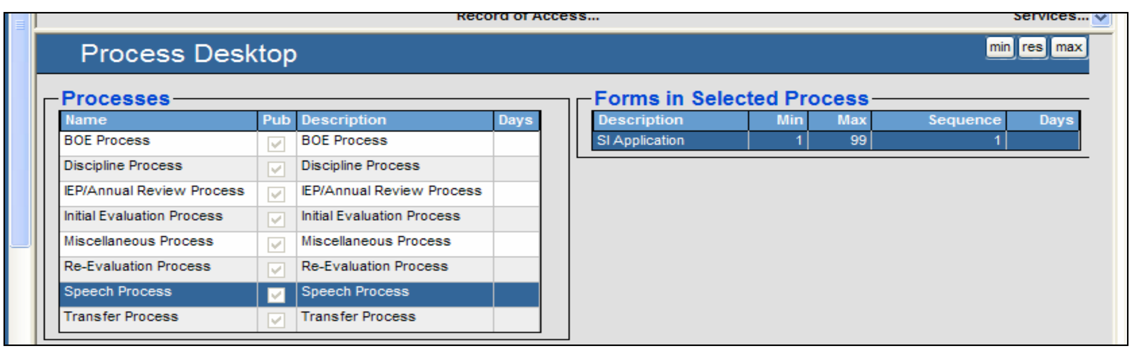
- **Menu Item**
  - o <u>Full Access</u>: User has the ability to access and change all items in the menu tree.
  - o <u>Write</u>: User may change data from the menu.
  - o <u>Read</u>: User has view-only rights to items such as the folder.
- **<u>Schools</u>**: Lists the schools to which the user has access.
- **<u>Load</u>**: Refreshes the page.
- **<u>Save</u>**: Saves the information changed in the program.

Process Desktop

Process Desktop is a resource utility that allows an administrator or manager to see the state requirements for a selected process. When viewing the Process Desktop, the user will select a process on the left side of the screen and the forms in that selected process will display on the right side. *Min*, *Max*, *Sequence* and *Days* are also displayed in the right side of the screen.

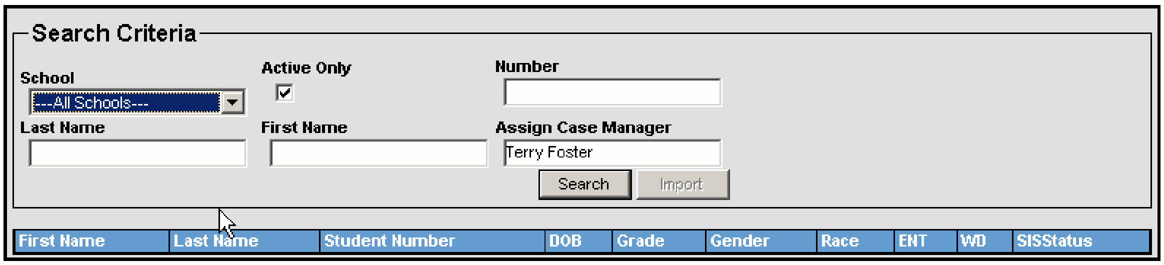
- **<u>Min</u>**: The minimal number of times this form must appear within this process. If zero (0) is displayed, the form is optional.
- **<u>Max</u>**: The maximum number of times a form may appear within a process. If a one (1) is displayed, the form is required for completion.
- **<u>Sequence</u>**: The order in which the forms are listed within the Process Desktop.
- **<u>Days</u>**: The maximum number of days for which a form can be open. If this field is blank, the form has no expiration date.

Below is the IEP Process. The forms within the process are displayed on the right side.



Create Student Folder

A user must have rights to create a folder before this menu will be displayed. Typically, a user with *Administrative* or *Manager* Rights will have access to this menu. Creation of a folder introduces a student to the Special Education process. As forms are completed in the program, the dates are written to the folder. The purpose of the folder is to house the most current information on Special Education students.



Creating a Student Folder

Select **Utilities Desktop | Create Student Folder**.

- **Assign Case Manager**: By default, the person logged in is assigned as the Case Manager.
  - To change the default, click the blue plus icon near the upper left corner of the *Case Manager* field.
  - At the next screen, enter the first few letters of the employee's last name and click **Search**.
  - Highlight the name of the desired Case Manager and click **OK**.
- When creating a Folder, you may search by *School*, *Number*, *Last Name*, *First Name* or *Active Only*.
- After entering the last name in the appropriate field, click **Search**.

When searching for students, the search screen will display only those students who have no folders. This is a good way to check for duplicate students in the *daisi* database.

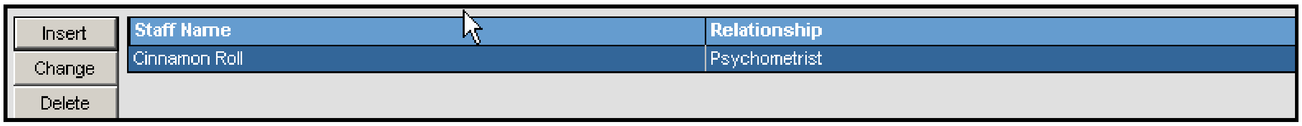
Important Note: If a student is not listed in STIDistrict Workstation, the student record will not appear in STISETSWeb. Also note that when the *Active* box is checked when searching, only students who are Active in STIOffice will display.

- Highlight the name of the desired student and then either double-click on the name or click **Import**.

Caseload Assignment

The purpose of the *Caseload Assignment* section is to create the Special Education relationship(s) between staff members and particular students. The student listed at the top of the screen is the student you are working with. A staff member may be associated with a student in multiple ways. For example, a Special Education teacher may also provide a Related Services, such as hearing.

All assignments are performed here except assignment of a Case Manager. This procedure is done in the *Student Desktop* under **Change Case Manager**.



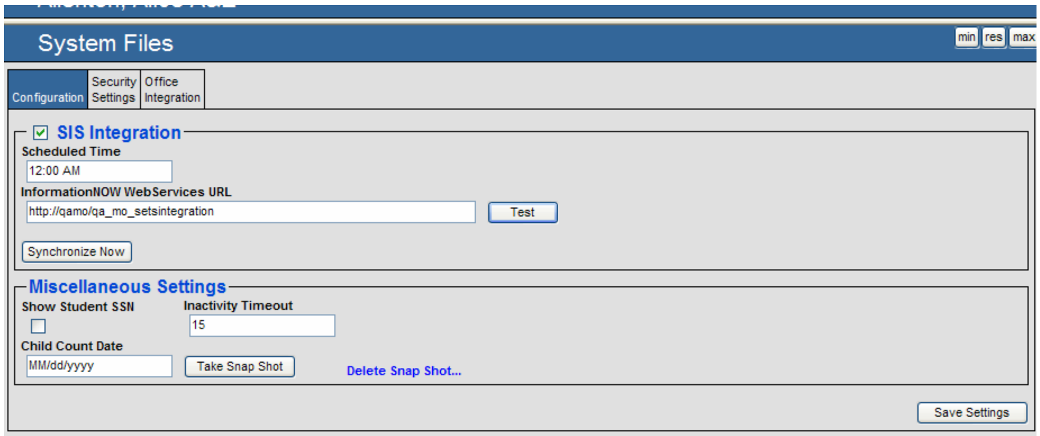
Assigning (Relating) Teachers to Students

- Select the *Caseload Assignment* menu from the **Utilities** Desktop.
- Make note of the student name displayed at the top of the screen. You are assigning teachers to this student.
- Click **Insert**.
- Click the blue plus icon to search for an employee.
  - Enter the first few letters of the employee's last name and then click **Search**.
  - Select the appropriate name, the name will now be highlighted in blue. Click **OK** to continue.
- Click the down arrow to select this employee's relationship to the student. Then click **OK** to save.
- Repeat the above steps to add employees who are related to this student.

Note: The types of relationships are pulled from the District Code Categories (Staff-Student Relationship). This is one of the few editable codes.

System Files

The *System Files* menu houses several options that enhance the operation of the software. It is recommended that only one person have access to the System File. This should be kept under high security.

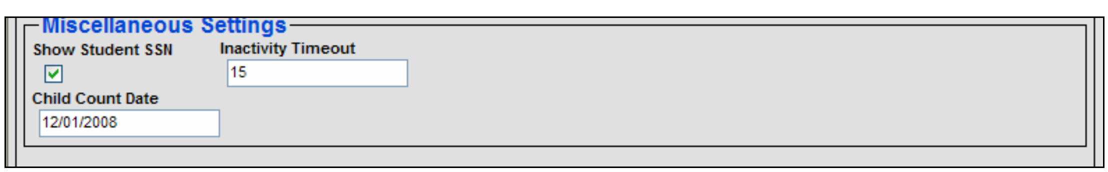


- **Scheduled Time**: The administrator may set a scheduled time each day for the students in STISETSWeb to have their STIOffice demographic data updated.
  - The user should enter the time as *HH:MM* (A.M or P.M.)
  - For example: If 1:30 A.M. is entered, this will indicate that every morning at 1:30 A.M., the system will refresh the Special Education student information with the latest changes that occur in STIOffice (in correspondence with STIDistrict).

Note: The time entered here must a time AFTER which your STIDistrict (daisi import) uploads are complete.

- **InformationNOW WebServices URL**: Enter ONLY IF YOUR DISTRICT HAS *Information***NOW** installed. This field should contain the URL used to access *Information***NOW**. Leave blank if STIOffice is used.

Miscellaneous Settings



- **Show Student SSN**: This allows student Social Security Numbers to be hidden or displayed within the STISETSWeb program. These numbers will only be seen in the Student folder on the *Services* tab.

- **Inactivity Timeout**: Inactivity logout time may be set here, up to 15 minutes. After this amount of time has expired and there has been no activity in the program, the user will be automatically logged out.
- **Child Count Date**: Enter the system Child Count Date here. This is generally December 1st of the current school year. However, this date may be changed for Child Count error testing.

Security Policy Settings Tab

This tab is used to maintain passwords on an administrative level.

- **Password Expiration Days**: The value entered in this field will set user login passwords to expire in the specified number of days. For example, every 30 to 90 days, the system could require users to change their passwords.
- **Remembered Passwords**: A setting that allows several previously used passwords to be remembered. Users cannot use the same password once their password expires.
- **Lock out Minutes**: This is the number of minutes a user is allowed to attempt to sign on. If a user tries to log on unsuccessfully beyond this amount of time, the user's account will be locked. The user will then have to go to the administrator to unlock the account.
- **Lock out Threshold**: This is the number of times a user may attempt to log in with an incorrect password. If a user tries to log in unsuccessfully this number of times, the user's account will be locked. The user will then have to go to the administrator to unlock the account.

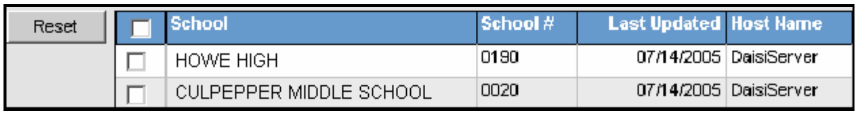
About Passwords

Passwords are crucial to the security of the Special Education data. Here are some helpful hints on passwords.

- Users should create "strong" passwords. A strong password consists of both letters and numbers, and at least one special character, such as (*, @, #, $, %, ^, & or*).
- Easily remembered phrases comprised of some special characters might be used for passwords. For example: *$mile@me2*, or "Smile at me too".
- A user should never share his or her password or user name with anyone else, especially students. Use a different word or phrase each time you change your password.
- If you think someone has your password, change it immediately.
- If you cannot remember your password and you must write it down, be sure to store the password in a secure location.

Office Integration Tab

This tab is a support tool for Administrators to manage each school's Office Integration service. This tab displays the school, school number, the date on which Office Integration was last run, and the name of the computer hosting the Office Integration service.



To use the *Office Integration* tab:

- Check the box to the left of the appropriate school.
- Click **Reset**. You will notice the date of the last update is now blank.

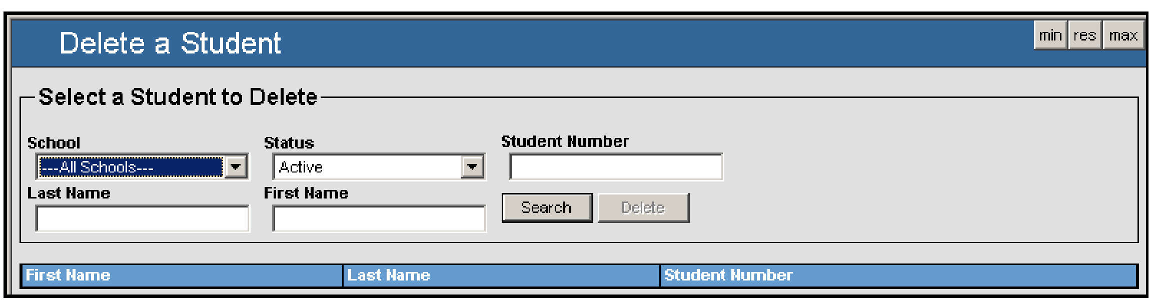
The next time Office Integration runs, it will refresh all Special Education data to the selected school.

Note: The Office Integration program is essential for displaying real time discipline and attendance data in STISETSWeb.

Student Maintenance

Delete a Student

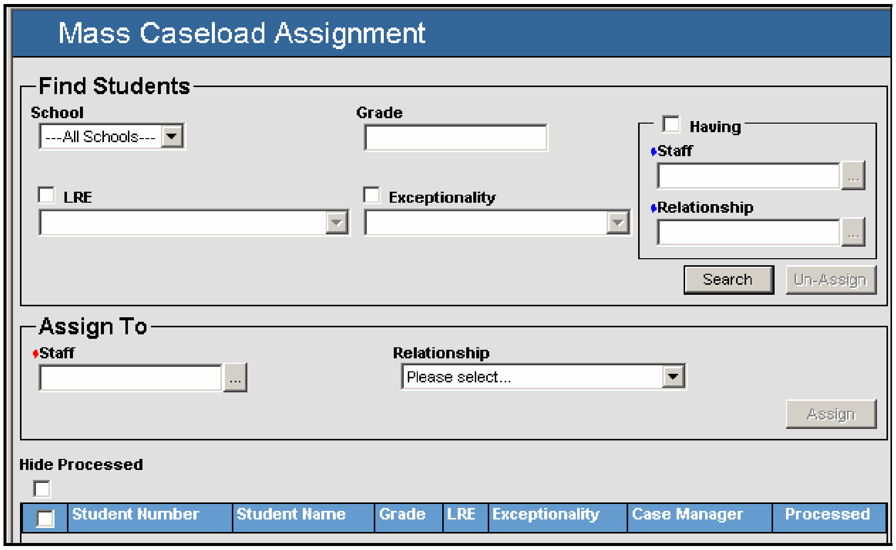
Occasionally it becomes necessary to delete a student folder record. For example, a Special Education Folder may have been created by mistake for a student. Deleting a student from the STISETSWeb database does not delete the student from the STIDistrict database or the STIOffice program; the only record deleted is the student's Special Education Folder record.



- Select **Delete a Student** from the *Utilities Desktop*.
- Students may be searched by *Status*, *Last Name*, or *First Name.*
- After the desired search criteria have been entered, click **Search**.
- Highlight the name of the student to be deleted and click the **Delete** button on the lower right.
- After deletion, the program will return to the *User Desktop*.

Note: You have deleted the folder record only, not the entire student record. Also, remember that students who have Completed forms cannot be deleted.

Mass Caseload Assignment



This utility is used to change relationships from one staff member to another. This should be utilized at the start of school or end of year when students are moving from schools or grades.

Mass Caseload Assignment is a two-step process. The user must first decide which students are to be moved from their current teachers. Secondly, the user should decide which teacher would receive these students.

To mass-move a caseload or relationship, the following steps are necessary:

- In *Find Students*, you may search: School, Grade, LRE
- An advanced search option is available on the right hand side of the screen called *Having*. This is an ideal tool for instances in which when a teacher's entire caseload is moved to another teacher. In the *Having* search, you may search for which staff member is currently servicing the student and what relationship that staff member has with the student.
- Once you have fulfilled the search criteria, click the **Search** button.
- Notice there is one more search option, called *Assign To*. Use this feature to define the staff member to whom the selected students are to be assigned. The relationship must be defined as well. DO NOT click **Assign** at this point.
- Select the student from the search box below. When the box beside the appropriate student has been checked, click **Assign**.
- Continue this process until all students have been moved to the appropriate staff member.

Archive Students

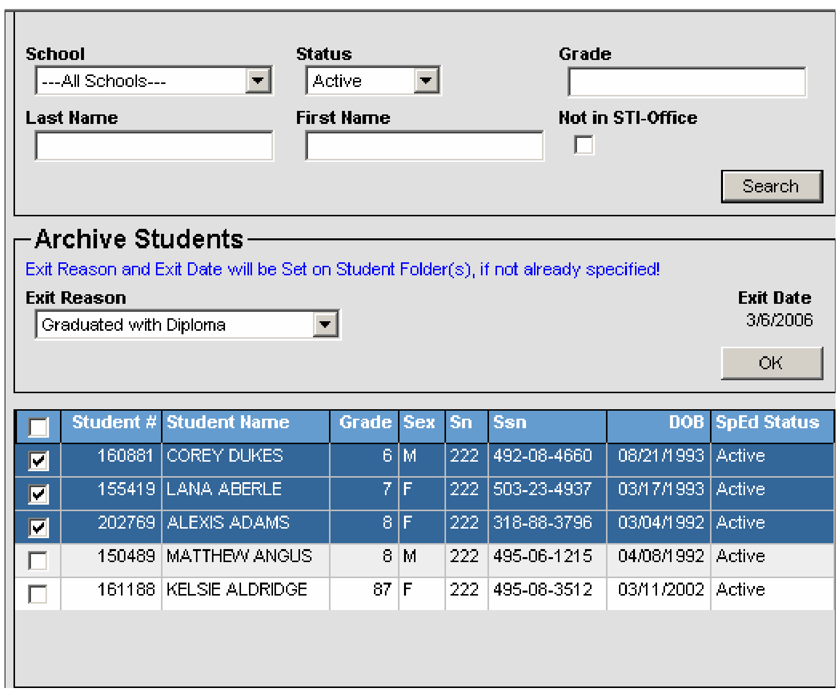
This feature is provided to allow users to file students who are no longer receiving services in a district. Since districts are required to retain student files for several years after the student leaves your district, the Archive feature eliminates the need to perform daily routines on these student records.

Please note that the Archival process is typically an End of Year procedure. The basic action performed during this process is the selection of students followed by the mass exiting of those students. However, individual student records may also be archived.

Also note that Archiving automatically changes the Exit Reason. Archiving does NOT change the status of the student folder.

- First, search the students as done previously.
- Check the *non-STIOffice* checkbox to select students who are not in the STIOffice program.
- Click **Search** to continue.
- Continue to the *Archive Students* box. Select the *Exit Reason* and select an *Exit Date*. This information will be set on the student's folder if not already specified.
- Check the box next to each applicable student's name.

Note: To select multiple students, hold down the *Shift* key on the keyboard and click each one.

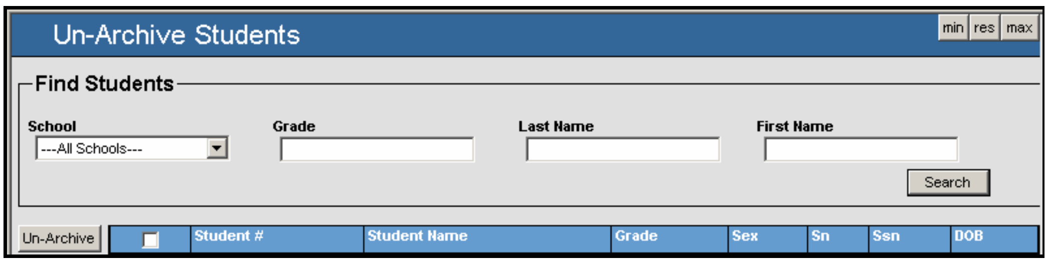


Un-Archive Students

This utility is used to bring students back from Archived status. It is recommended that this procedure only be used as the Special Education director has outlined within your district.

To Un-Archive a student:

- First, locate the student(s) to Un-Archive.
  - Select the appropriate school and grade.
  - Enter several letters of the student's last name and/or first name to search.
- Click in the checkbox to un-archive a student or click in the checkbox to the right of Un-archive to select all students. To select multiple checkboxes, hold down the *Shift* key on the keyboard as you check each box.
- After all boxes have been selected, click the **Un-Archive** button to the right of the search results field.



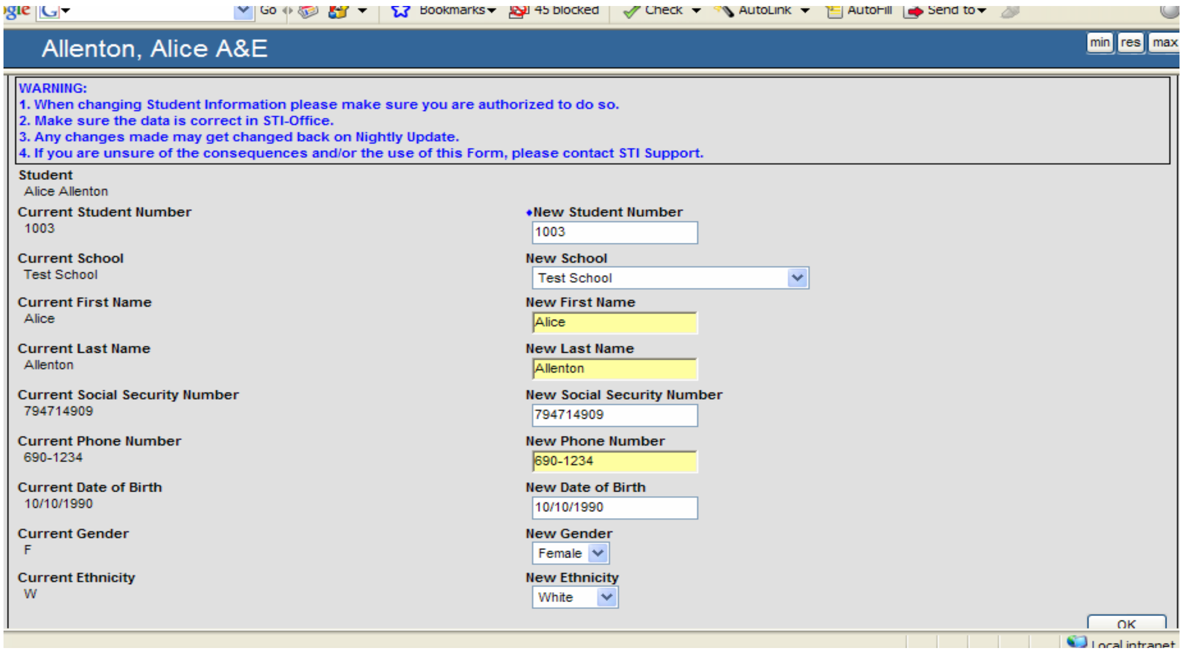
Critical Student Information

This tool should only be used by a System Administrator. **Critical Student Information** is used to change a student's existing Student Number (or other student information) in STISETSWeb to match that in STIOffice. The following data elements may be changed: *Student Number*, *School*, *First Name*, *Last Name*, *Social Security Number*, *Phone Number*, *Date of Birth*, *Gender and Ethnicity*.

<u>WARNING</u>:

- When changing Student Number and/or school, please make sure you are authorized to do so.
- Before changing the Student Number and school in STISETSWeb, verify that this information is correct in STIOffice.
- Modify the Student Number as needed. ONLY USE NUMBERS. Entry of any other value may wipe out all data in the *Student Number* field.

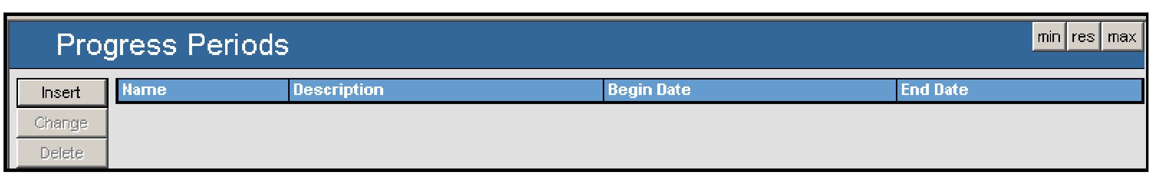
- If you are unsure of the consequences and/or the use of this form, please contact STI Support at 1-800-844-0884.



Progress Periods

Progress Periods are used by System Administrators to set the current progress reporting periods. Progress periods are used in conjunction with the STISETSWeb Progress Report, found on the Reports Desktop. A maximum of eight Progress Periods may currently be entered.

- Click **Insert** to add a new progress period.
- Outline the progress reporting periods as needed.
- Enter the date in *MM/DD/YYYY* format.
- Selecting **Change** allows for the modification of an existing progress period.
- **Delete** allows for the deletion of a current progress period.

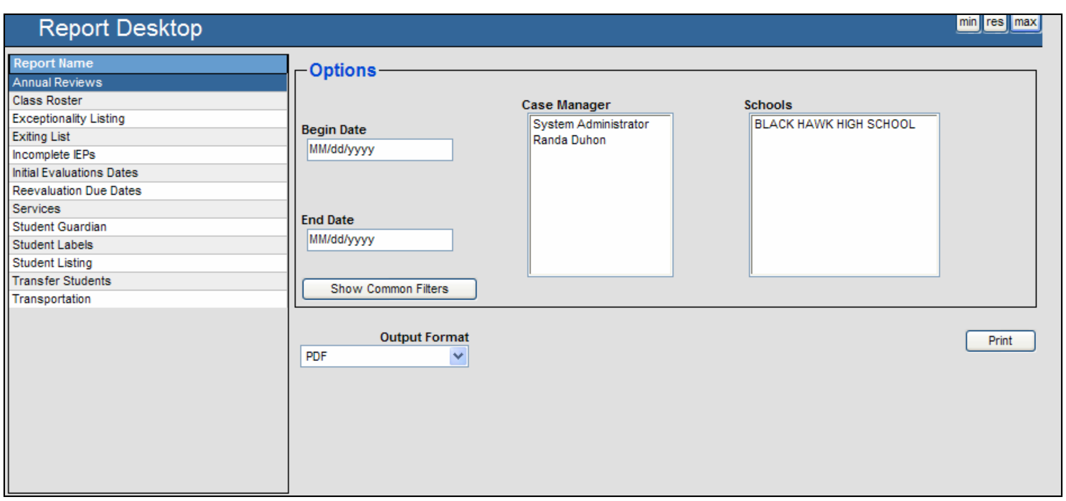


Report Desktop & Report Caseload

About Report Desktop

Only users who have *Manager* or *Administrative* rights will have access to this menu. The difference in this menu and the one with the same name under Student Desktop is that this menu allows reports to be run for all students in an entire school or district, whereas the reports option under Student Desktop allows reporting only for students in a particular teacher's caseload. Many reports come preloaded with the program (ex: *Caseloads*).

- Highlight the desired report on the left side of the screen.
- If appropriate, select the proper options.
  - Many reports provide the option of running the report by School.
  - You many also set a *Date Range* to search on some forms.
  - An *Active Student* checkbox is selected automatically; remove the check to print the report for all students.
- *Output Format* allows you to open the report in other programs. Adobe Reader (which creates the report in .PDF format) is chosen by default.
  - **PDF** brings up Acrobat Reader.
  - **RTF** brings up Microsoft Word.
  - **XLS** brings up Excel Spreadsheet.
- Click **Print** to preview the report.



Pre-loaded Reports

Reports pre-loaded in STISETSWeb include:

- **Annual Reviews**
- **Class Roster**
- **Exceptionality Listing**
- **Exiting List**
- **Incomplete IEP's**
- **Initial Evaluations Dates**
- **Reevaluation Due Dates**
- **Services**
- **Student Guardian**
- **Student Labels**
- **Student Listing**
- **Transfer Students**
- **Transportation**
- **Incomplete IEP's**

Child Count Reports

- **Child Export File**

Annual Reviews Report

Data Fields

- **Case Manager** (prints on header of the report)
- **District Name**
- **Student ID**
- **Student Name**
- **School**
- **Date of Birth**
- **Sex**
- **Race**
- **IEP Begin Date**
- **IEP Due Date**
- **Total Student Assigned to:** (Case Manager's name)
- **Total Student Assigned to:** (total number of students assigned to Case Manager)
- **Grand Total** (total number of students listed on the report)

Filter By

- **School**
- **Case Manager**
- **Begin / End Date** (if no dates are entered, the filter will include all dates)
- **Status**
- **Race**
- **Age**
- **Grade**
- **Gender**
- **Exceptionality**
- **LRE**

Security

User access rights will determine which students may be included in these reports.

- Users with Administrator rights should be able to generate a report with all students.
- Case Managers should be able to generate this report only for students in their Caseloads.

Printing

- Grouped by Case Manager, then by students in alphabetical order.
- An option is available to page break by Case Manager.
- Output Format: .pdf, .rtf, .xls.

Class Roster

Data Fields

- **District Name**
- **School Name**
- **Case Manager**
- **Student Name**
- **Exceptionality Code**
- **LRE**
- **IEP Begin Date**
- **IEP End Date**
- **Re-Eval Due Date**

Filter By

- **School**
- **Case Manager**
- **Status**
- **Race**
- **Age**
- **Grade**
- **Gender**
- **Exceptionality**
- **LRE**

Security

User access rights will determine which students may be included in these reports.

- Users with Administrator rights should be able to generate a report with all students.
- Case Managers should be able to generate this report only for students in their Caseloads.

Printing

- Grouped by Case Manager, then by students in alphabetical order.
- An option is available to page break by Case Manager.
- Output Format: .pdf, .rtf, .xls.

Grouping

- By school

Security

By default, only Managers and Administrators will have access to this report.

Exceptionality Listing Report

Data Fields

- **District Name**
- **School Name**
- **Case Manager:**
- **Student ID**
- **Student Name**
- **Exceptionality Code**
- **Grade**
- **Sex**

- **Race**
- **DOB**

Filter By

- **School**
- **Case Manager**
- **Status**
- **Race**
- **Age**
- **Grade**
- **Gender**
- **Exceptionality**
- **LRE**

Security

User access rights will determine which students may be included in these reports.

- Users with Administrator rights should be able to generate a report with all students.
- Case Managers should be able to generate this report only for students in their Caseloads.

Printing

- Grouped by Case Manager, then by students in alphabetical order.
- An option is available to page break by Case Manager.
- Output Format: .pdf, .rtf, .xls.

Exit List Report

Data Fields

- **District Name**
- **School Name**
- **Case Manager**
- **Student ID**
- **Student Name**
- **DOB**
- **Age**
- **Exceptionality Code**
- **Grade**
- **Sex**

- **Race**
- **Exit Description**
- **Exit Date**
- **Home Address**

Filter By

- **School**
- **Case Manager**
- **Begin / End Date** (if no dates are entered, the filter will include all dates)
- **Status**
- **Race**
- **Age**
- **Grade**
- **Gender**
- **Exceptionality**
- **LRE**

Security

User access rights will determine which students may be included in these reports.

- Users with Administrator rights should be able to generate a report with all students.
- Case Managers should be able to generate this report only for students in their Caseloads.

Printing

- Grouped by Case Manager, then by students in alphabetical order.
- An option is available to page break by Case Manager.
- Output Format: .pdf, .rtf, .xls.

Incomplete IEP's Report

Data Fields

- **District Name**
- **School Name**
- **Case Manager**
- **Student Name**
- **DOB**
- **Sex**
- **Race**

- **IEP Begin Date**
- **IEP End Date**

Filter By

- **School**
- **Case Manager**
- **Status**
- **Race**
- **Age**
- **Grade**
- **Gender**
- **Exceptionality**
- **LRE**

Security

User access rights will determine which students may be included in these reports.

- Users with Administrator rights should be able to generate a report with all students.
- Case Managers should be able to generate this report only for students in their Caseloads.

Printing

- Grouped by Case Manager, then by students in alphabetical order.
- An option is available to page break by Case Manager.
- Output Format: .pdf, .rtf, .xls.

Initial Evaluations Dates Report

Data Fields

- **District Name**
- **School Name**
- **Case Manager**
- **Student ID**
- **Student Name**
- **DOB**
- **SEX**
- **Race**
- **Initial Evaluation Date**

Filter By

- **Case Manager**
- **School**

Security

This report may be generated at the district level only. .

Printing

- Output Format: .pdf, .rtf, .xls.
- All Disabilities should be listed across the top of this report.
- This report should generate totals such as Initial Referral by Source Report.

Reevaluation Due Date Report

Data Fields

- **District Name**
- **School Name**
- **Case Manager**
- **Student Name**
- **Exceptionality Code**
- **LRE Code**
- **Status**
- **Grade**
- **Sex**
- **Race**
- **ReEvaluation Due Date**

Filter By

- **School**
- **Case Manager**
- **Begin / End Date** (if no dates are entered, the filter will include all dates)

Security

This report may be generated at the district level only.

Printing

- Output Format: .pdf, .rtf, .xls.

Services Listing Report

Data Fields

- **District Name**
- **School Name**
- **Service Provider**
- **Service Provider ID #**
- **Student ID**
- **Student Name**
- **Service**
- **Amount**
- **Begin Date**
- **End Date**

Filter By

- **School**
- **Case Manager**
- **Include Special Education Services**
- **Include Related Services**

Security

User access rights will determine which students may be included in these reports.

- Users with Administrator rights should be able to generate a report with all students.
- Case Managers should be able to generate this report only for students in their Caseloads.

Printing

- plus 1 for each student assigned to case management load)

Student Guardian Listing

Data Fields

- **Case Manager** (prints on header of the report)
- **Student Name**
- **Student ID**
- **Home Room**
- **Grade**
- **Race**
- **Sex**

- **Date of Birth**
- **Age**
- **Bus #1 and #2**
- **Exceptionality Code**
- **Status**
- **Address**
- **City/State/ZIP**
- **Phone**
- **Total Student Assigned to:** (Case Manager's name)
- **Total Student Assigned to:** (total number of students assigned to Case Manager)
- **Grand Total** (total number of students listed on the report)

Filter By

- **School**
- **Case Manager**
- **Status**
- **Race**
- **Age**
- **Grade**
- **Gender**
- **Exceptionality**
- **LRE**

Security

User access rights will determine which students may be included in these reports.

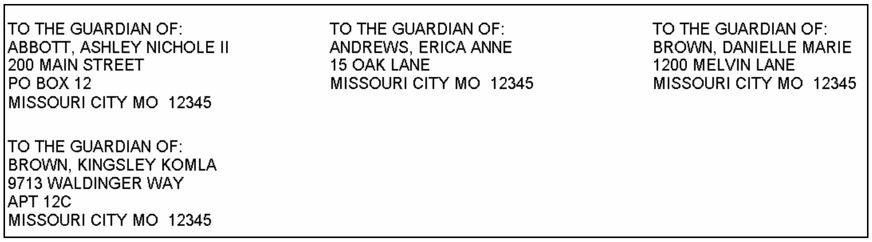
- Users with Administrator rights should be able to generate a report with all students.
- Case Managers should be able to generate this report only for students in their Caseloads.

Printing

- Grouped by Case Manager, then by students in alphabetical order.
- An option is available to page break by Case Manager.
- <u>Output Format</u>: .pdf, .rtf, .xls.

Student Labels

This report option will generate labels (Avery 5160) to print for mailing information to student guardians. Sample labels are shown below.


TO THE GUARDIAN OF:
ABBOTT, ASHLEY NICHOLE II
200 MAIN STREET
PO BOX 12
MISSOURI CITY MO 12345

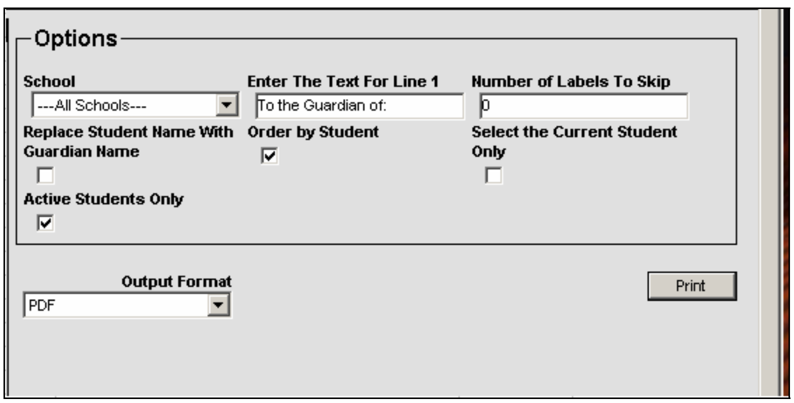
TO THE GUARDIAN OF:
ANDREWS, ERICA ANNE
15 OAK LANE
MISSOURI CITY MO 12345

TO THE GUARDIAN OF:
BROWN, DANIELLE MARIE
1200 MELVIN LANE
MISSOURI CITY MO 12345

TO THE GUARDIAN OF:
BROWN, KINGSLEY KOMLA
9713 WALDINGER WAY
APT 12C
MISSOURI CITY MO 12345

The addresses printed on the labels are drawn from the Student file in STIOffice. Lines 1 and 2 will be included, as shown in the addresses with a PO Box and apartment number above.

Options for Labels



- **School**: Use this drop-list to select whether to print labels for a single school or for all schools.
- **Enter the Text for Line 1**: Customized text may be entered here. This text will be printed above the student's name.
- **Number of Labels to Skip**: This option allows the user to set a special starting point on the sheet of labels. This is useful when some labels have already printed from the sheet.
- **Replace Student Name with Guardian Name**: If this box is checked, the guardian's name will be printed on each label. If the box is unchecked, student names will be printed.
- **Order by Student**: Check this box to print the labels in alphabetical order, by student.
- **Select the Current Student Only**: Check this box to print a single label for a selected student.
- **Active Students Only**: Check this box to exclude all students who are not currently Active.

- **Output Format**: Select the format in which to print the labels.

Student Listing

Data Fields

- **Case Manager** (prints on header of the report)
- **Date of Birth**
- **Age**
- **Student ID**
- **Exceptionality Code**
- **LRE**
- **School Number**
- **Status**
- **Sex**
- **Race**
- **Grade**
- **IEP Due**
- **Re-Eval Due**
- **Total Student Assigned to:** (Case Manager's name)
- **Total Student Assigned to:** (total number of students assigned to Case Manager)
- **Grand Total** (total number of students listed on the report)

Filter By

- **School**
- **Case Manager**
- **Status**
- **Race**
- **Age**
- **Grade**
- **Gender**
- **Exceptionality**
- **LRE**

Security

User access rights will determine which students may be included in these reports.

- Users with Administrator rights should be able to generate a report with all students.

- Case Managers should be able to generate this report only for students in their Caseloads.

Printing

- Grouped by Case Manager, then by students in alphabetical order.
- An option is available to page break by Case Manager.
- Output Format: .pdf, .rtf, .xls.

Transportation Report

Data Fields

- **District Name**
- **Case Manager** (prints on header of the report)
- **Student ID**
- **Student Name**
- **Grade**
- **Special Education**
- **Transportation Access**
- **Expiration Date**
- **Route**
- **Pick-up Time**
- **Drop-off Time**
- **Pick-up Address**
- **Drop-off Address**
- **Special Needs**
- **Comments**
- **Total Number Students Assigned to:** (Case Manager's name)
- **Total Number Students Assigned to:** (total number of students assigned to Case Manager)
- **Grand Total** (total number of students listed on the report)

Filter By

- **School**
- **Case Manager**
- **Include Only Student with Special Ed. Transportation marked**
- **Status**
- **Race**
- **Age**

- **Grade**
- **Gender**
- **Exceptionality**
- **LRE**

Security

User access rights will determine which students may be included in these reports.

- Users with Administrator rights should be able to generate a report with all students.
- Case Managers should be able to generate this report only for students in their Caseloads.

Printing

- Grouped by Case Manager, then by students in alphabetical order.
- An option is available to page break by Case Manager.
- Output Format: .pdf, .rtf, .xls.

Child Count Desktop

About Child Count

Child Count is an annual counting of students with disabilities. Child Count is run on December 1st of every year to generate state and federal funding for Special Education students. STISETSWeb checks for errors that will exclude the student from the Child Count. STISETSWeb provides a simple yet comprehensive way of checking for errors, correcting errors, and exporting Child Count data to the State Department of Education.

- Use the filter options to select the parameters of the Error List.
- The Error List may be run for all schools, a single school or by an individual staff member.
- The user must select the type of report to run: Error, Warning, or both.

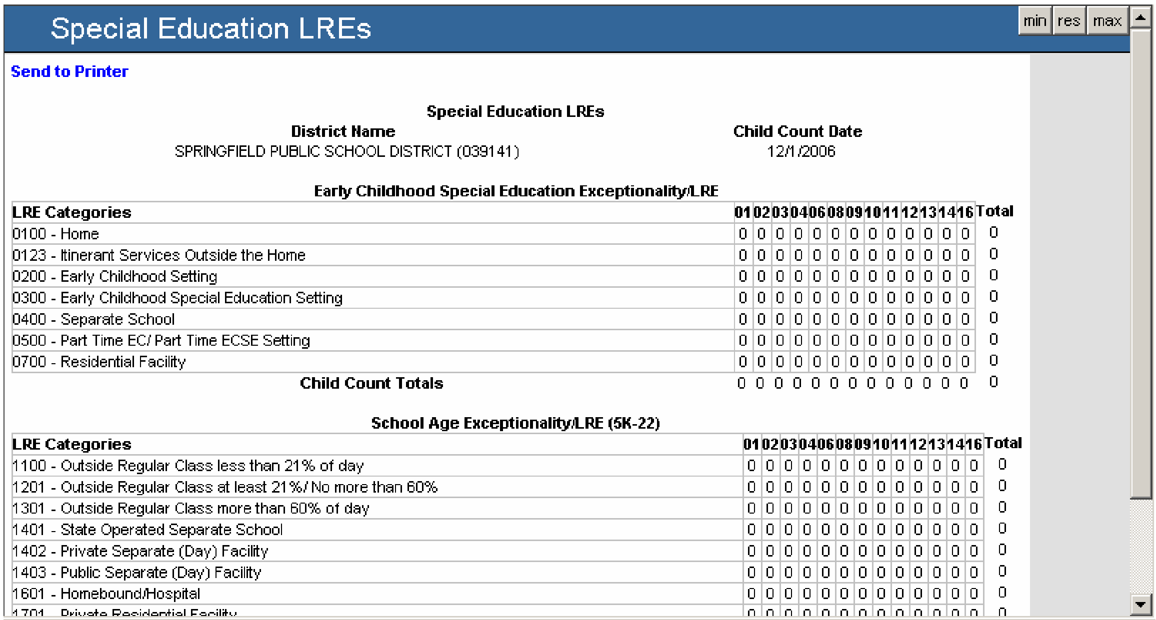
Child Count Export

Click **Export** under **Child Count Desktop** to create the Child Count file that is to be sent to the state department. Follow any instructions you may have received from the state on sending this file.

Note: .XML files are used for troubleshooting purposes only and should NEVER BE USED as export files for state reporting. For state reporting, always select the **Text** option.

LRE Count Report

This option will generate a Special Education LRE listing. An example is shown below.



Special Education LREs

Send to Printer

Special Education LREs

District Name SPRINGFIELD PUBLIC SCHOOL DISTRICT (039141)

Child Count Date 12/1/2006

Early Childhood Special Education Exceptionality/LRE

LRE Categories	01	02	03	04	06	08	09	10	11	12	13	14	16	Total
0100 - Home	0	0	0	0	0	0	0	0	0	0	0	0	0	0
0123 - Itinerant Services Outside the Home	0	0	0	0	0	0	0	0	0	0	0	0	0	0
0200 - Early Childhood Setting	0	0	0	0	0	0	0	0	0	0	0	0	0	0
0300 - Early Childhood Special Education Setting	0	0	0	0	0	0	0	0	0	0	0	0	0	0
0400 - Separate School	0	0	0	0	0	0	0	0	0	0	0	0	0	0
0500 - Part Time EC/ Part Time ECSE Setting	0	0	0	0	0	0	0	0	0	0	0	0	0	0
0700 - Residential Facility	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Child Count Totals	0	0	0	0	0	0	0	0	0	0	0	0	0	0

School Age Exceptionality/LRE (5K-22)

LRE Categories	01	02	03	04	06	08	09	10	11	12	13	14	16	Total
1100 - Outside Regular Class less than 21% of day	0	0	0	0	0	0	0	0	0	0	0	0	0	0
1201 - Outside Regular Class at least 21%/ No more than 60%	0	0	0	0	0	0	0	0	0	0	0	0	0	0
1301 - Outside Regular Class more than 60% of day	0	0	0	0	0	0	0	0	0	0	0	0	0	0
1401 - State Operated Separate School	0	0	0	0	0	0	0	0	0	0	0	0	0	0
1402 - Private Separate (Day) Facility	0	0	0	0	0	0	0	0	0	0	0	0	0	0
1403 - Public Separate (Day) Facility	0	0	0	0	0	0	0	0	0	0	0	0	0	0
1601 - Homebound/Hospital	0	0	0	0	0	0	0	0	0	0	0	0	0	0
1701 - Private Residential Facility	0	0	0	0	0	0	0	0	0	0	0	0	0	0

When selected, this report will be generated automatically, with no report parameters required from the user.

To print a hard copy of the report, click **Send to Printer** in the upper left corner.

STISETSWeb – SETS Query

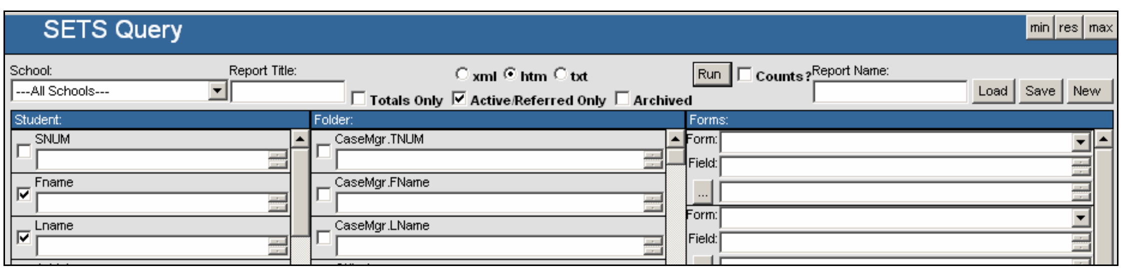
About the SETS Query Feature

SETS Query and *SETS Query (Caseload)* are designed to allow Administrators, Managers and Teachers to build reports based on teacher caseloads, school-wide or district-wide listings. *SETS Query (Caseload)* is designed to build user-defined reports based ONLY on an employee's caseload. An employee who has been assigned a Security Role of *Teacher* will use this report option after login. Following the steps in this section will allow Administrators, Managers or Teachers to build custom reports with selection of specific data elements. Administrators and Managers may use this component by selecting the **Report Desktop** and then choosing **SETS Query**. Teachers may use this component by selecting **Report Desktop** and then choosing **SETS Query (Caseload)**. While the query is being built, a display of the report organization will appear at the bottom of the SETS Query screen. This allows users to view the report layout.

- **School**: Use the drop-down list to choose a particular school for which to build a report. The *All Schools* option may also be used to build a report for all schools in the database.

Note: Teachers will only have access to schools attended by their caseload students.

- **Report Title**: If a preloaded query is used, the report name will display here.



- **Xml, HTM, Txt**: Choose the format in which the report will be generated.
  - Xml: Used more for trouble-shooting.
  - HTM: This is the default format that generates "live" reports (double-clicking on any student's information from the report preview screen brings up the child's folder for editing/viewing).
  - Txt: Text Format
- **Counts Only**: Check this box to generate a report listing totals only.

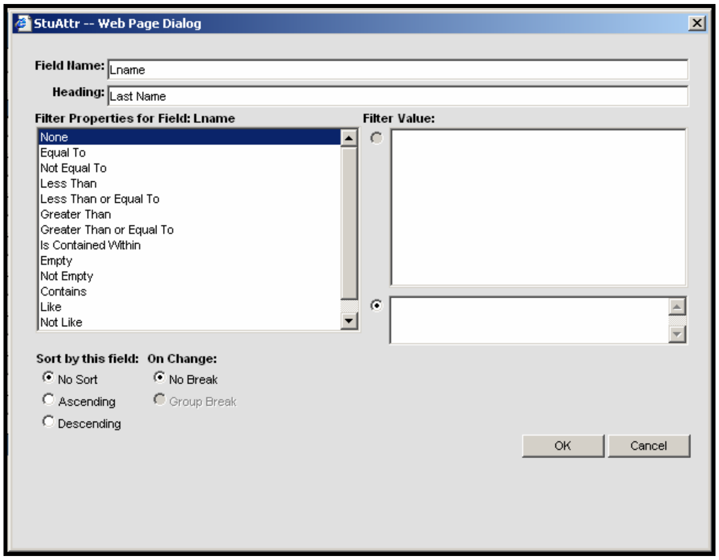
- **Active/Referred Only**: Check this box to generate a report of active and referred students only. If left unchecked, the report will include inactive students also.
- **Archived**: This will display only students who have been archived.
- **Run**: Click this button to run the report.
- **Counts**: Check this box to display counts at the bottom of the screen, based on the criteria selected.
- **Report Name**: This text box displays the name of a saved or loaded report.
- **Load**: Click here to load a previously saved report.
- **Save**: Select this option to save the report.
- **Public**: This will allow all users of SETSWeb to use your saved report
- **Private** This report will only be available to the user that created it.
- **New**: Select this option to clear all fields, preparing the screen for a new report.

STISETSWeb Query Fields

There are three headings that contain text fields and drop-down boxes that may be applied to the report.

- **Student Fields**: Student Demographic fields. Select the checkbox to include the information in the report. After selecting a checkbox, the user may filter further by clicking on the text next to the checkbox.
- **Folder Fields**: Data from student Special Education folders. Select the checkbox to include this information in the report. After selecting a checkbox, the user may filter further by clicking on the text next to the checkbox.
- **Form Fields**: Data from student forms. Use the drop-down box to select the form to include on the report. Then use the ellipsis button to select the field from the report to query data.

STISETSWeb Query Filters



- **Field Name**: The name of the field to be filtered will display here.
- **Filter Value**: Use the lower small box to type in the desired filter value. Some fields will have associated codes that will appear in the upper filter value box for selection.
- **Select Properties for Field**: In the box at the left, highlight a desired filter property.
  - None: No filters applied
  - Equal To: Use this property to search for an exact result.
  - Not Equal To: Use this property to find items not equal to the specified filter value.

    Example: Use equal filters on the last name field to select all kids whose last name is equal to ***Smith***.
  - Less Than: Use this filter to find students with fields less than the specified filter value (such as date fields, age or grade).
  - Less Than or Equal To: Use this filter to find students with fields less than or equal to the filter value (such as date fields, age or grade).
  - Greater Than: Less Than: Use this filter to find students with fields greater than the filter value (such as date fields, age or grade).
  - Greater Than or Equal To: Use this filter to find students with fields greater than or equal to the filter value (such as date fields, age or grade).

    Example: Use less than and greater than filters to filter a certain age, date, grade or a range of these fields.
  - Empty: Use this filter to find all students who have no information in a particular field.

- Not Empty: Use this filter to find all students who have data in the selected field.
- Is Contained Within: This filter may be used with age or grade.
- Like: This may be used as an *equal to* filter by entering the exact value sought in the filter value range. This may also be used to find like filters.
- Not Like: This may be used as a *not equal* to filter by entering the exact value sought in the filter value range. This may also be used to find unlike filters.

  Example: Use the *Like* option on the last name field and place *%a%* in the filter value box. This will give you a report of all students with a last name that begins with an *A*.
- Between: Use this filter along with a comma to separate age, grade or a date range.
- Sort by this Field: Select either *No Sort*, *Ascending* or *Descending*.

Building Reports with SETSWeb Query

The following sections provide step-by-step examples of how to build reports with SETSWeb Query. The same basic procedures are used for building all reports with this feature. The differences in these reports are the format and data elements selected. All queried reports using the HTML format are “live” reports, i.e. clicking on a student’s name displays that student’s folder.

The option to designate reports as *Public* or *Private* may be used when reports are saved for future use.

The designation of *Public* allows anyone with access to SETS Query to run the report. The designation of *Private* allows only the creator of the report to run it.

Report of Students with Blank Exceptionality Codes

The following example demonstrates the step-by-step process of creating a report of all students (listed alphabetically) who have blank LRE or Exceptionality Codes. This report will be helpful for correcting Child Count Errors. With the HTML format, a user may to click on a student’s name and go directly to the student’s folder to edit the LRE or exceptionality.

- **Step 1**: From the Reports Desktop, select **Sets Query**.
- **Step 2**: If appropriate, click the down arrow to select a school**.** As an example, assume the selection is *All Schools*.
- **Step 3**: Enter a *report title*. As an example, assume the title is *Students with Blank Exceptionality Codes*.
- **Step 4**: In the column labeled *Student*, check the following data elements in this order: *SNUM*, *Last Name* and *First Name*. (Note: The order in which data elements are selected is the order in which these elements print on the report.) Then click **OK**.
- **Step 5**: In the *Folder* column, check *EXC.Code*.

- **<u>Step 6</u>**: Click on the text labeled *EXC.Code*. This displays a new *Web Page Dialog* box.
- **<u>Step 7</u>**: From the left box, highlight *Equal To*.
- **<u>Step 8</u>**: From the right box, highlight *00*.
- **<u>Step 9</u>**: Click **OK**.
- **<u>Step 10</u>**: Click **Run**.
- **<u>Step 11</u>**: From the preview of this report, double-click on any student's name to display the student's folder. It may be necessary to edit the Exceptionality in the folder for any/all students in this report. The same procedure may be run on blank LRE's, *Most Recent Date Enrolled*, etc.

Special Education Students over the Age of 16

- **<u>Step 1</u>**: From the Report Desktop, select **SETS Query**.
- **<u>Step 2</u>**: If appropriate, click the down arrow to select a school. As an example, leave the selection at *All Schools*.
- **<u>Step 3</u>**: Enter a report title. In this example, use *Special Education Students Over the Age of 16*.
- **<u>Step 4</u>**: In the column labeled *Student*, check the following data elements: *SNUM*, *LName*, *FName* and *Age*.
- **<u>Step 5</u>**: Click on the text labeled *Age*.
- **<u>Step 6</u>**: At the next screen, highlight *Greater Than* in the left box and highlight *16* in the right box. Then click **OK**.

Appendix A: Missouri Code Bank

Missouri Codes

Areas of Assessment Codes

Code	Description
1	Autism Rating Scale
2	Assessment by Individual Trained in Autism
3	Adaptive Behavior
4	Intellectual Evaluation
5	Academic Achievement
6	Classroom Observation
7	Standard Based/Criterion Referenced Tests
8	Adaptive
9	Cognitive
10	Communication
11	Motor Development
12	Social/Emotional
13	Birth to Three Assessment
14	Interview with parent/child/teacher
15	Anecdotal Records/Discipline Reports
16	Behavior/ Self Concept Scales
18	Observation
19	Functional Behavioral Assessment
20	Documentation of Need for Special Education
21	Audiological Evaluation
22	Hearing Screening
25	Articulation Evaluation
26	Expressive Language Evaluation
27	Receptive Language Evaluation
28	Language Sample
29	Dysfluency Assessment
31	Intellectual Evaluation
32	Classroom Achievement

Code	Description
33	Portfolio/Work Samples
34	Curriculum Based Assessment
36	Environmental, Cultural, Language and Economic Information
38	Vision Screening
39	Optometric/Ophthalmic Evaluation
40	Visual/Motor Integration
41	Orientation and Mobility Evaluation
43	Developmental History
46	Parent Report
47	Rating Scales
48	Record Review
50	Assistance Team Meeting Information
51	Clinical Psychological/Psychiatric Reports
52	Counselor Report
53	District or State Assessment
54	Documentation of Accommodations/Interventions Implemented
55	Medical Report
56	Outside Evaluations
57	Teacher Report
58	Transfer Records

Related Services Codes

Code	Description
PS	Psychological Services
SSW	School Social Services
OT	Occupational Therapy
AS	Audiological Services
SLP	Speech/Language Pathology as a Related Service
PT	Physical Therapy
TS	Transportation Services
SHS	School Health Services
CS	Counseling Services, including Rehabilitation Counseling
MS	Medical Services (Diagnostic or Evaluation)
OM	Orientation and Mobility (V only)
EI	Educational Interpreting

Code	Description
R	Recreation
O	Other Related Services
AT	Assistive Technology

Special Education Services Codes

Note: These codes may be edited by the user.

Code	Description
AS	Academic Skills
BasH	Basic History
BasR	Basic Reading
BasSS	Basic Study Skills
FC	Functional Cooking
FW	Functional Writing
LA	Language Arts
LSM	Life Skills Math
Mon	Monitor
PAR	Pre-Academic/Readiness Skills
Sc	Science
SocS	Social Skills
SS	Social Studies
TS	Transition Skills
WS	Work-Study
BasE	Basic English
BasM	Basic Math
BasS	Basic Science
BMR	Behavior Management/Regulation
FR	Functional Reading
JPT	Job Prep/Training
LS	Life Skills
M	Math
MS	Motor Skills
R	Reading
SL	Speech/Language
Sp	Spelling
StuS	Study Skills
WL	Written Language
Blank	(Blank)

Supplementary Aids and Services Codes

Currently, there are no preinstalled codes for this area. The user will add these codes as needed.

Program Modification Codes

Currently, there are no preinstalled codes for this area. The user will add these codes as needed.

Frequency Type Codes

Note: These codes may be edited by the user.

Code	Description
Daily	Daily
Weekly	Weekly
Monthly	Monthly
Yearly	Yearly
Quarter	Quarter
Semester	Semester
Term	Term
Block	Block
Blank	(Blank)

Location Codes

Note: These codes may be edited by the user.

Code	Description
SpEd	Special Education Classroom
RegEd	Regular Education Classroom
TherRm	Therapy Room
Blank	(Blank)

Duration Codes

Code	Description
15	15 minutes
30	30 minutes
45	45 minutes
60	60 minutes
90	90 minutes
Blank	(Blank)

Appendix B: Missouri Processes

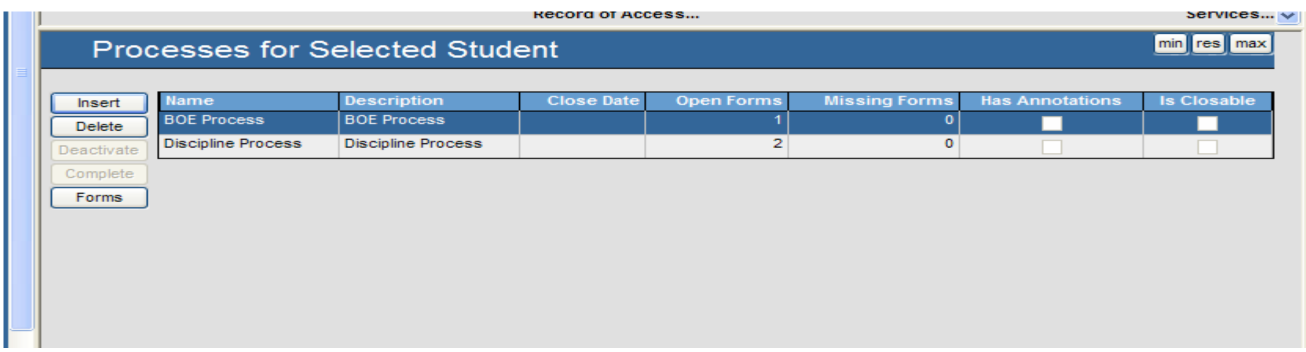
Assigning Processes

A *Process* is defined as a group of forms that must be completed within a specified time period. In order to work on specific forms for a student, the user must first assign an appropriate Process (containing all required forms) to the student. Perform the following steps to assign processes and to track Special Education forms:

- Upon login, the teacher's Caseload will be displayed on the opening screen. Select a student by double-clicking on the student's name. Users logging in with administrative rights may select a student through the *Select a Student* menu option.
- At the next screen, click **Insert** to assign a process to the selected student.

BOE Process

- At the next screen, click the down arrow to select a process, such as **BOE**, and then click **OK**.
- The next screen displays the selected process. The buttons on the left are defined as follows:
    - o **Insert**: Insert allows the user to attach a new process to a student. If a process is not listed when you click **Insert**, verify that the process is not already open for the current student.



    - o **Delete**: Allows the user to delete a process from a student's file. **Delete** may only be selected if no forms have been completed in that process.
    - o **Deactivate**: Allows the user to remove a process. You may deactivate a process with open forms. Users are strongly advised to be cautious when using this option. Once a record is deactivated, the program writes that a process has been deactivated to the

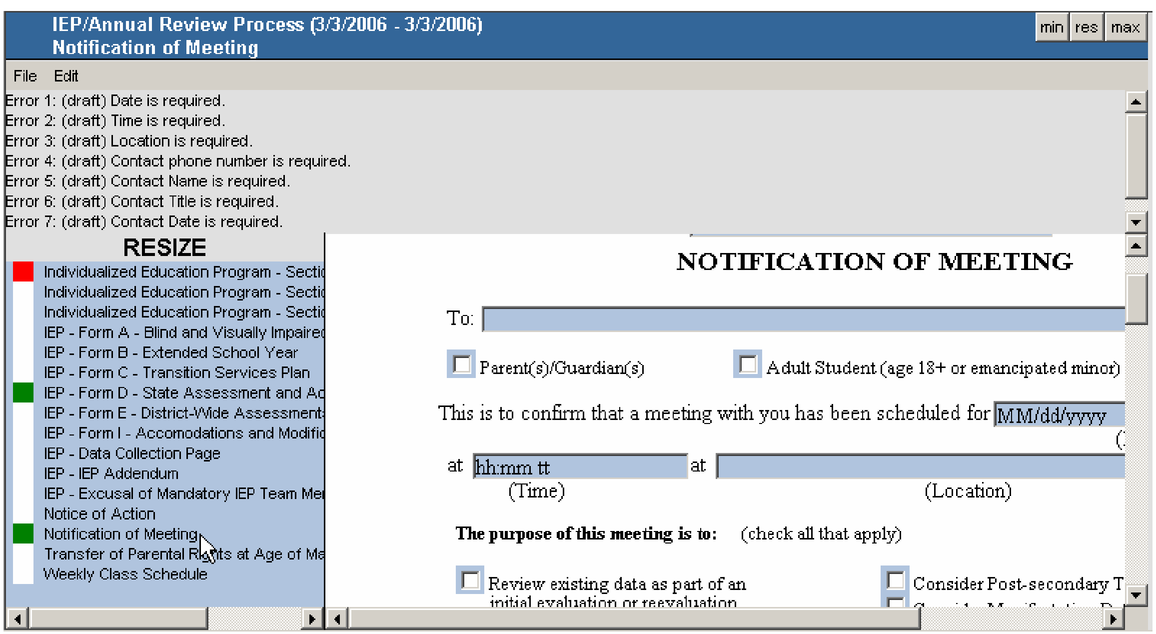
Record of Access. Note: Only Managers have rights to deactivate a process.

- **Complete/Re-open**: This button may display differently, depending on the process you are working with. **Complete** is used to complete forms and close a process. This allows the user to create a second instance of a process, when necessary. **Re-Open** allows the user to return to forms or processes that have previously been completed.
- **Forms**: The **Forms** button will bring up all forms that are associated with the highlighted process. When this button is selected, the forms will appear on the work area of the screen. With the reauthorization of Forms, Forms no longer have a minimum count.

Generating an IEP Process

Click the **Forms** button to display the forms in the selected process.

- At the next screen, click on the desired form on the left side of the screen. If necessary, click **RESIZE** to widen the display of the forms list.
- Rules have been added to the program requiring completion of designated fields before a form may be saved.
- All forms list errors that will be displayed when requirements are not met. Clicking directly on the error will highlight the error field in red.
- Scroll down the screen to complete appropriate information. After completing the form, select the **File** menu and click **Save Changes**.



- To work on another form in a process, click on the form on the left of the screen. For example (as shown below): the *IEP/Annual Review Process* Navigation from form-to-form is accomplished in this manner.

- After all required fields have been completed, the form must be officially completed in the program. To do this, select **File | Complete Form**. After a form has been completed, no changes are allowed.
- Making changes to a previously completed (locked) section of the IEP may be accomplished by selecting **Create Amendment** from the *Edit* menu. As forms are amended, the changes may be viewed from the *View Audit Trail* option of the *Edit* menu.

Explanations of colored square icons appear to the left of each form (to view descriptive screen tips, allow the mouse to rest on each icon).

- **Green**: Designates a form that is *Open*. The form is in draft status, meaning changes are allowed. All forms except forms sent home for signature will print with a *Draft* watermark until the form is completed.
- **Red**: Designates a *Complete* form. No changes are allowed.
- **White**: Designates *Not required for process completion.*
- **Blue**: Designates *Open (Amendment)*. This is a previously completed form with an Amendment attached.

File Menu

- **Save Changes – F10**: Allows user to save the changes made to the form. Information entered on forms may be saved either by selecting the **Save Changes** option from the *File* menu or by pressing the *F10* key.
- **Reseed Data**: Allows the user to update data on a form. After a saved form is re-opened, any additional demographic information updated in the Special Education Folder will automatically transfer to this form when this option is selected.
- **Cancel Changes**: Allows the user to cancel the changes made to a form. In other words, selecting **Cancel** will cancel any changes made to a form since the last save.
- **Complete Form**: Allows the user to mark form as complete. No changes will be allowed after this option is selected except by creating an Amendment. Required fields must be completed before this option is selected. Errors will prompt the user to enter required information before completing the form and fields with errors will be highlighted for easy identification.
- **Print to PDF**: Allows the user to open form in a .PDF format for printing.
- **Print Process**: Opens a screen allowing the user to print all or part of the forms in a process.

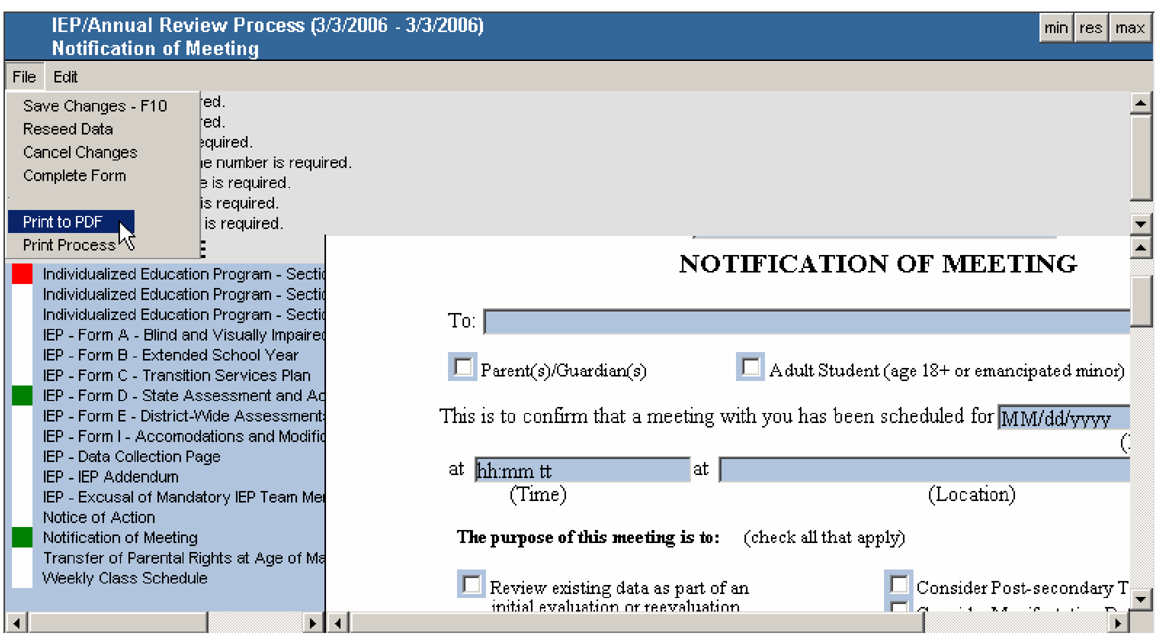
Edit Menu

- **Check Spelling – F7**: Allows the user to perform a Spell Check on the selected form.
- **Show Form Indicators**: Allows visually impaired users to see the status of each form in a process.

- **View Audit Trail**: This feature allows access to the edited versions of a form by date.
- **Exit Form**: Allows the user to exit the form.
- **Add Form**: As forms are needed throughout a process, they may be added by selecting the *Edit* menu and then choosing the **Add Form** option.
- **Remove Form**: Allows user to delete the highlighted form if it is not the required form in the process.
- **Move Form**: Allows the user to move a completed form from an incorrect process to the correct process. Do not use this option to copy the previous year's IEP to the current year. This would only be used for correcting a mistake (for instance, suppose a form was completed in the wrong process).
- **Create Amendment**: An amendment may be created to adjust data on a completed form. You must add a second form to amend the current form. The computer automatically archives the previous version of the form. You can view this process in the *View Audit Trail* option, located under the *Edit* menu.
- **Annotate Process**: Allows the user to record commentary on the forms and processes. The state department may view this area, which is now printable as well. The user might use this option to notate, for example, that a meeting was delayed due to a tornado warning.

Printing Forms

To print the form, select the **File** menu and then click **Print to PDF**. After previewing the form, click the printer icon at the top of the screen to complete the printing process. The example shown below demonstrates a printed form in draft status. The *Draft* watermark will print in the background until the document has been marked as completed.



MO Required Processes

This section lists the various MO state processes required for Special Education students.

BOE Process

Special Education File Received By BOE.

Discipline Process

This process contains the following forms:

- Special Education Discipline Documentation Form
- Notification Of Meeting

IEP/Annual Review Process

This process contains the following forms:

- Individualized Education Program - Section A
- Individualized Education Program - Section B
- Individualized Education Program - Section C
- IEP – Form A – Blind and Visually Impaired
- IEP – Form B – Extended School Year
- IEP – Form C – Transition Services Plan
- IEP – Form D – State Assessment and Modification
- IEP – Form E – District Wide Assessment
- IEP – Form F – Accommodations and Modifications
- IEP – Data Collection Page
- IEP – IEP Addendum
- IEP - Excusal Of Mandatory IEP Team Members Agreement Form
- Post Secondary Goals
- Notice Of Action
- Notification Of Meeting
- Transfer Of Parental Rights At Age Of Majority
- Weekly Class Schedule
- Behavioral Intervention Plan
- Student Information Release Form
- Summary Of Performance

Initial Evaluation Process

- Request for Consideration For Initial Special Education Evaluation

- Description Of Areas to be Assessed and Know Tests to be Used
- Summary of Existing Data_ Cover Page
- Summary of Existing Data_Results
- Summary of Existing Data_ Signature Page
- Summary of Existing Data_Documentation
- Notice of Action
- Notification of Meeting
- Transfer Of Parental Rights At Age Of Majority
- Weekly Class Schedule
- Student Information Release Form

Miscellaneous Process

- IEP -Data Collection Page
- Public Notice
- Notification of Destruction of Student Special Education Records
- Transfer Of Parental Rights At Age Of Majority
- Weekly Class Schedule
- Student Information Release Form
- Behavior Intervention Plan
- Homebound Documentation

Re- Evaluation Process

- Triennial Evaluation Documentation
- Description of Areas to be Assessed and Known Tests to be used
- Summary of Existing Data_ Cover Page
- Summary of Existing Data_Results
- Summary of Existing Data_ Signature Page
- Summary of Existing Data_Documentation
- Notice of Action
- Notification Of Meeting
- Student Information Release Form

Speech Process

- SI Application

Transfer Process

- IDEA OUT -OF- STATE Transfer Student
- IDEA IN-STATE Transfer Student
- Individualized Education Program - Section A
- Individualized Education Program - Section B
- Individualized Education Program - Section C
- IEP – Form A – Blind and Visually Impaired
- IEP – Form B – Extended School Year
- IEP – Form C – Transition Services Plan
- IEP – Form D – State Assessment and Modification
- IEP – Form E – District Wide Assessment
- IEP – Form F – Accommodations and Modifications
- IEP – Data Collection Page
- IEP – IEP Addendum
- IEP - Excusal Of Mandatory IEP Team Members Agreement Form
- Post Secondary Goals
- Notice Of Action
- Notification Of Meeting
- Transfer Of Parental Rights At Age Of Majority
- Student Information Release Form

Glossary of Terms

Browse Boxes

Browse boxes are the white fields containing data within menus; e.g., the student list in Student Desktop is displayed in a browse box.

Complete

When all work is finished on a form, the user will apply the complete feature to the form. After this button has been selected, no changes can be made without an amendment.

Draft Mode

Forms are in draft mode from the time they are inserted until a user marks them **Complete**. A draft is often thought of as a "working document."

Editing Data

The **Edit** commands, located below or beside most browse boxes, are used to modify data in certain fields. Following are the three Edit options:

Click **Insert** to add a new record.

Click **Change** to alter an existing record.

Click **Delete** to permanently remove an existing record.

The **Change** and **Delete** buttons only appear when those commands may be used. If no records are listed in the browse box, **Insert** will be the sole editing option.

Field

The term field is used to refer to any space in which the user enters data on the computer screen.

Form

A form is a document specified to track a particular action made by the District/LEA.

Forms in STISETSWeb

Scrolling forms are used in all screens that require them. In such screens, the scroll bar will be located on the right side of the screen. Users may click, tab or scroll through the form to view the various data fields.

HH/mm/tt

This field can be seen primarily within the State-approved forms featured on the site. *HH/mm* stands for hours and minutes; *tt* stands for A.M. or P.M.

Example: 09:35 PM

Inactivity Logoff

If there has been no activity in the program for eight minutes, the program will automatically log off, losing any unsaved data. The user must log in again to access the program. To avoid loss of unsaved data, the user should periodically save data entered in the program, because unsaved data will NOT be automatically saved when the program shuts down.

List Items and the Drop-down Arrow

In some instances, the user will enter information in STISETSWeb by typing it directly in the appropriate field. For example, the *Profile* section of the IEP is manually typed by the user.

Other data fields, however, require the user to select items from a list. Some list items, such as *Student's Primary Language* or *Exceptionality*, come pre-installed with the program.

To access the list, the user would click on the drop-down arrow on the right side of the field and click on the desired item to select it.

Note that data cannot be manually entered when drop-down arrows are present.

Lookup

The **Lookup** button allows an employee to look up specific students on their caseload. After the user clicks the **Lookup** button, the list of students displayed onscreen are students who have been assigned to the person logged in. Lookup can be accomplished either by highlighting the desired student's name and clicking **Select**; or the user may double-click on the student's name.

Menu

Menu is a multi-purpose term referring to any onscreen box containing options for the user. The STISETSWeb main menu is the opening screen that appears after the user has logged in to the program.

Mm/dd/yyyy

This item can be seen primarily within the State-approved forms featured on the site. *Mm/dd/yyyy* stands for Month, Day and Year. For example, 12/13/2004.

Mouse-Clicking

For purposes of this document, the terms **Click**, **Choose** or **Select** will indicate a single left-click of the mouse.

Double-click indicates a double left-click of the mouse. Right-click indicates a single right-click of the mouse.

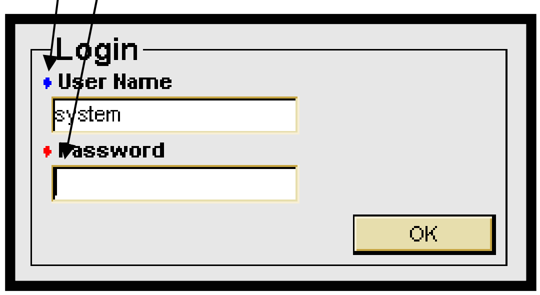
Dragging refers to the process of left-clicking on an item and, without releasing the mouse button, sliding the item to another field. When the mouse button is released, the item has been moved.

Process

A process is a set of forms that have to be completed in a specified time frame (e.g., Initial Evaluation through IEP = 90 days). Each of the processes lists all forms that are required for that process. No changes are allowed to the state-defined processes that come pre-installed.

Red and Blue Diamonds

The user may notice a red or a blue diamond next to some fields in the STISETSWeb program. A *red* diamond indicates that the requirements for that field have not been met. A *blue* diamond will indicate that the requirements for that field HAVE been satisfied.



Reseed

Selecting this option updates information on previously saved forms. The updated information is drawn from the Special Education folder. For example, if a user saves a Referral form, and at some subsequent point the spelling of the student's name changes, the **Reseed** option will update the information in the Referral form with information directly from the folder.

Resizing Windows

The three buttons located at the top right of each screen (**Minimize**, **Resize** and **Maximize**) are used to resize the image you are viewing on the screen. Use **Minimize** to decrease the size of the window. Use **Resize** to return to the default size. Use **Maximize** to make the screen larger for ease of view.

Synchronize

Selecting this option allows the user to synchronize previously saved folder information with updated information from the district database. In other words, if a student's address changed since the folder was created, clicking this button updates information in the folder from the district database, which contains daily updated information from the STIOffice program at each local school

Tree Menu

The STISETSWeb menu is located on the left hand side of the screen. This tree menu is set up to allow the user to locate the sub-menus and all information contained within these sub-menus.

To view the STISETSWeb sub menus or to view the contents within each sub-menu, the user should click on the **Plus** icon next to the STISETSWeb menu header or the next to the sub-menu heading. The user may then click on the desired heading to view a working screen for the item selected.

Watermark

A "watermark" is used to mark a document that is still in its *Draft* stages. When the document has been completed, the watermark will be removed. Not all forms feature a watermark. Any form that is sent home for parent/guardian consent will not feature a watermark.

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